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Evaluation of the Early Implementation of the Childcare Offer for Wales

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In conjunction with
NatCen Social Research

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Table of contents

List of tables.....	5
List of figures.....	6
Glossary.....	7
Executive summary	9
1 Introduction	25
2 Methodology	43
3 Implementing the Childcare Offer for Wales.....	52
4 The Offer's influence on providers	67
5 The Offer's impact on parents	86
6 Conclusions.....	117
7 Recommendations	125
Reference section	126
Annex A: The Childcare Offer compared	131
Annex B: Childcare Offer for Wales Logic Model	135
Annex C: Childcare Offer for Wales – pilot areas.....	136
Annex D: Organisations consulted during the evaluation.....	138
Annex E: Topic guide for Childcare providers	139
Annex F: Online survey for participating parents	146

List of tables

Table 1.1. Definitions of different types of childcare.....	32
Table 1.2. Number of childcare providers delivering the Offer in each EILA, broken down by type of childcare provider (September 2017 to August 2018)	40
Table 1.3. Average number of hours booked and attended per term per child	42
Table 2.1. Research questions	43
Table 2.2. Overview of methodology.....	45
Table 2.3. Number of childcare providers interviewed by EILA.....	47
Table 2.4. Survey response rates by EILA.....	49
Table 2.5. Number of parents interviewed per EILA	50
Table 4.1. Summary of influences on childcare providers.....	70
Table 5.1. Proportion of participating parents within each annual gross salary band between September 2017 and August 2018.....	94
Table 5.2. Proportion of lowest earner within each household within each annual gross salary band between September 2017 and August 2018.....	95
Table 5.3. Annual household income of survey respondents.....	107

List of figures

Figure 1.1. The development of the Childcare Offer for Wales	37
Figure 1.2. The number of children accessing the Offer and childcare providers delivering the Offer in each EILA during the first year of implementation.	41
Figure 3.1. The parent application process for the Childcare Offer in Wales	64
Figure 5.1: How parents heard about the Offer.....	88
Figure 5.2. Reasons why the application process was difficult	92
Figure 5.3 Changes in access to Welsh-medium and bilingual provision since the Offer ..	105
Figure 5.4. Whether Offer had changed respondents' work hours by gender.....	106
Figure 5.5. Percentage of parents (either respondent or partner) that work more hours since taking up the Offer by income group	108
Figure 5.6. Flexibility in work decisions by respondents' gender	109
Figure 5.7. Whether respondent parents have more time for training by work hours.....	110
Figure 5.8. Impact of Offer on family disposable income by local authority	111

Glossary

Acronym/Key word	Definition
ALN	Additional Learning Needs.
Childcare Offer	30 hours a week of government-funded early education and childcare for working parents of three- and four-year-olds, for up to 48 weeks of the year.
CIW	Care Inspectorate Wales – the independent regulator of social care and childcare in Wales.
Communities for Work	Welsh Government programme targeting those furthest away from the labour market.
CSA	Childcare Sufficiency Assessment – carried out every five years by local authorities to identify gaps in childcare provision.
Cwlwm	Childcare Wales Learning and Working Mutually – a consortium of the five main childcare organisations in Wales.
Cylch Meithrin	A Cylch Meithrin is a Welsh-medium playgroup (plural: Cylchoedd).
EILA	Early Implementer Local Authority.
Estyn	The Education and Training Inspectorate in Wales.
Families First	Welsh Government programme providing support for all families who need help regardless of income or where they live.
Flying Start	Welsh Government programme providing support in Wales' most deprived communities for children (0-3 years) and their families.
FIS	Family Information Services - the point of contact for advice and information on local services for families and carers and provide information on childcare.
Foundation Phase	The developmental curriculum for all three to seven-year-olds in Wales.
FPN	Foundation Phase Nursery Provision – a minimum of 10

	hours a week of funded early education for three- and four-year-olds during term time, from the term following a child's third birthday. Sometimes referred to as early education entitlement and funded early education.
Maintained provider	A local authority funded nursery, they can be standalone nursery schools or attached to a primary or infant school.
NDNA	National Day Nurseries Association.
Non-maintained provider	A childcare setting operated by a private, voluntary, or independent childcare provider.
PaCE	Parents Childcare and Employment; Welsh Government programme covering the cost of childcare while parents undertake training, work experience or volunteering to gain the skills needed to get a job.
PACEY	Professional Association for Childcare and Early Years
PETC Wales	Playwork Education and Training Council for Wales.
PLASC	Pupil Level Annual School Census.
SEN	Special Educational Needs.
Rising Threes and Rising Fours	Children who are going to turn three at some point in that school year (sometimes referred to as FPN1). Rising Fours are children who will turn four at some point in that school year (FPN2).
Tax-Free Childcare	UK Government will pay £2 for every £8 paid for childcare of children under the age of 11 years, if parents are working for at least 16 hours a week.

Executive summary

Introduction

In September 2017, the Welsh Government began the early implementation of the Childcare Offer to test the provision of 30 hours a week of government-funded Foundation Phase Nursery Provision (FPN) and childcare for working parents of three and four-year-olds.

Arad Research, in conjunction with NatCen Social Research, was commissioned to undertake the evaluation of the first year of early implementation of the Childcare Offer. This summary presents an overview of the approach to, and findings of, the evaluation of the first year.

The Childcare Offer

The Welsh Government has committed to provide a total of 30 hours a week of government-funded early education and childcare for 48 weeks of the year, which includes nine weeks during school holiday periods. The Childcare Offer targets three and four-year-old children whose parents earn on average a weekly equivalent to, or more than, 16 hours at the national minimum wage or national living wage.

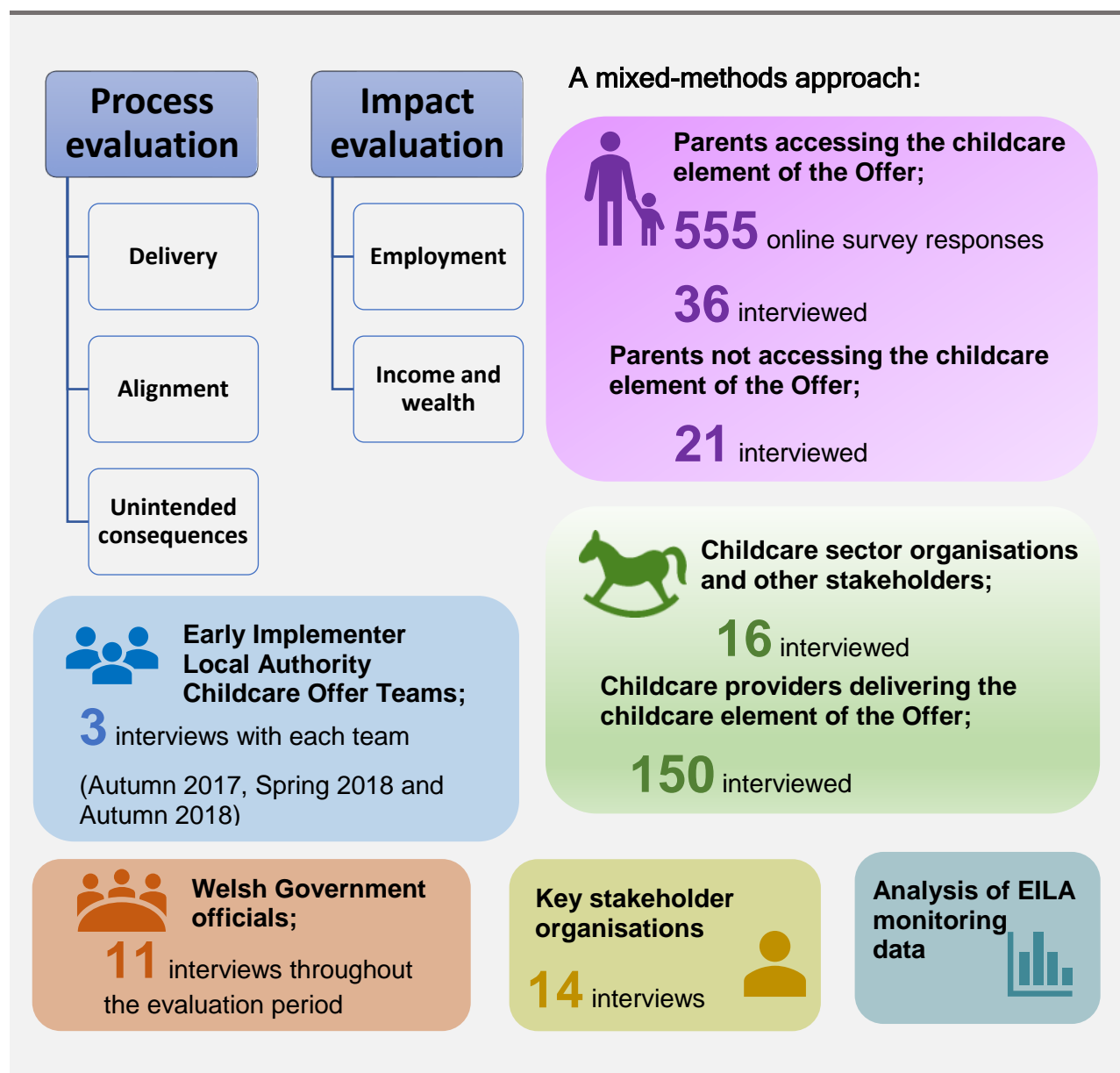
Since September 2017 the Childcare Offer has been available in the seven early implementer local authorities (EILAs), which included all, or part of, the following local authorities: Anglesey and Gwynedd (joint working), Blaenau Gwent, Caerphilly, Flintshire, Rhondda Cynon Taf and Swansea.

The intended short-term outcomes of the Offer include:

- Parents have more employment choices.
- Parents have increased disposable income.
- Parents can make an informed choice about using formal childcare.
- The childcare sector grows in response to increased demand and take-up of formal childcare.

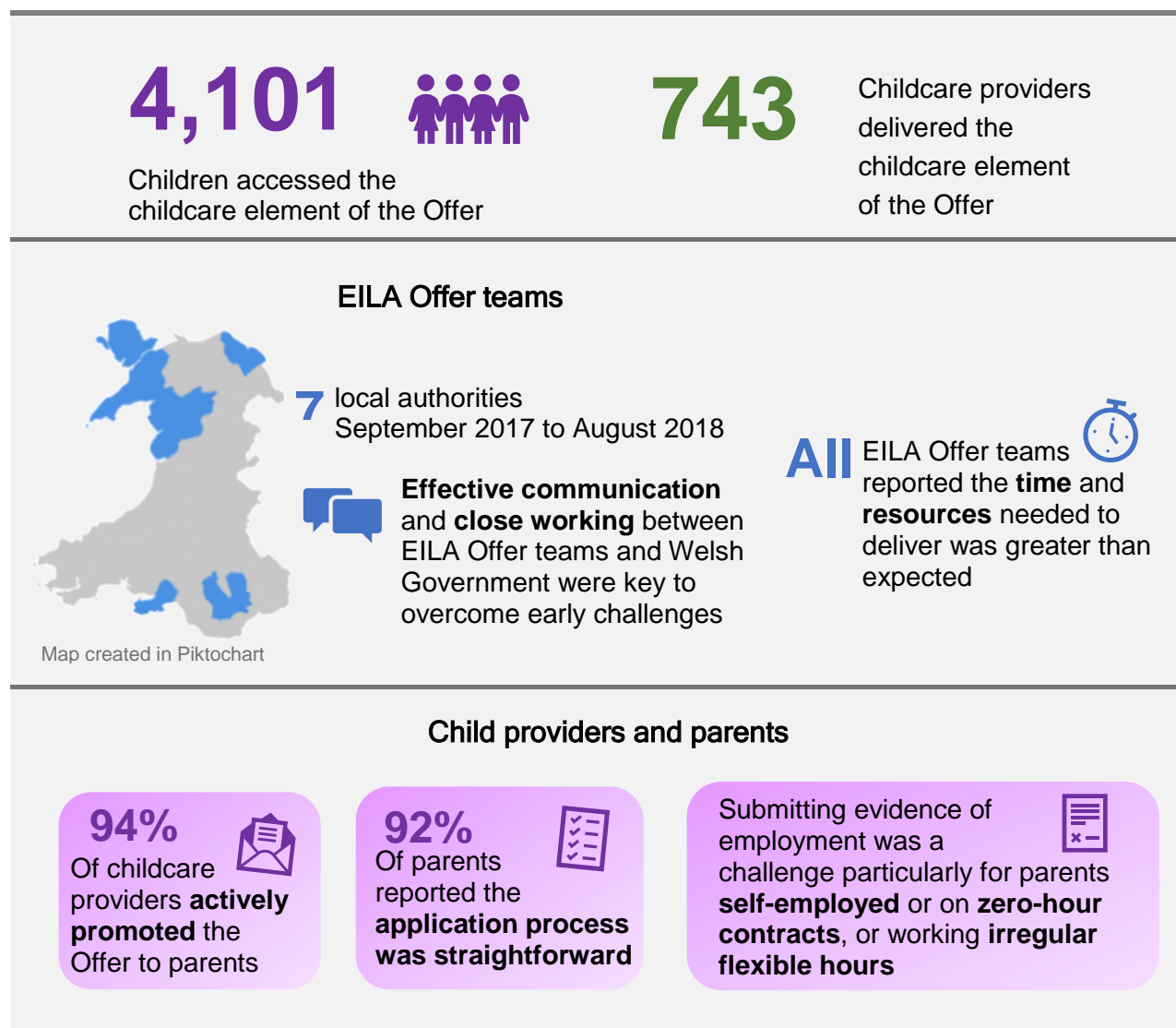
Methodology

The evaluation consisted of two parts – a process and an impact evaluation. A mixed methods approach was adopted for the evaluation, which involved several research strands, as summarised below.



Implementing the Childcare Offer

Key findings



EILA Offer teams: key findings relating to the structure and delivery of the Offer by EILA teams include;

- EILA Offer teams encountered some challenges when engaging childcare providers during the early stages, due to **information gaps** (e.g. hourly rate);
- Previous childcare/education-related roles of EILA Offer team members **positively influenced engagement** with childcare providers.
- EILA Offer teams typically included one full-time, and one or two part-time staff;

- Some EILA Offer teams '**borrowed**' **staff from other departments** within the local authority during peak demand on EILA Offer team time, particularly during high application processing periods.

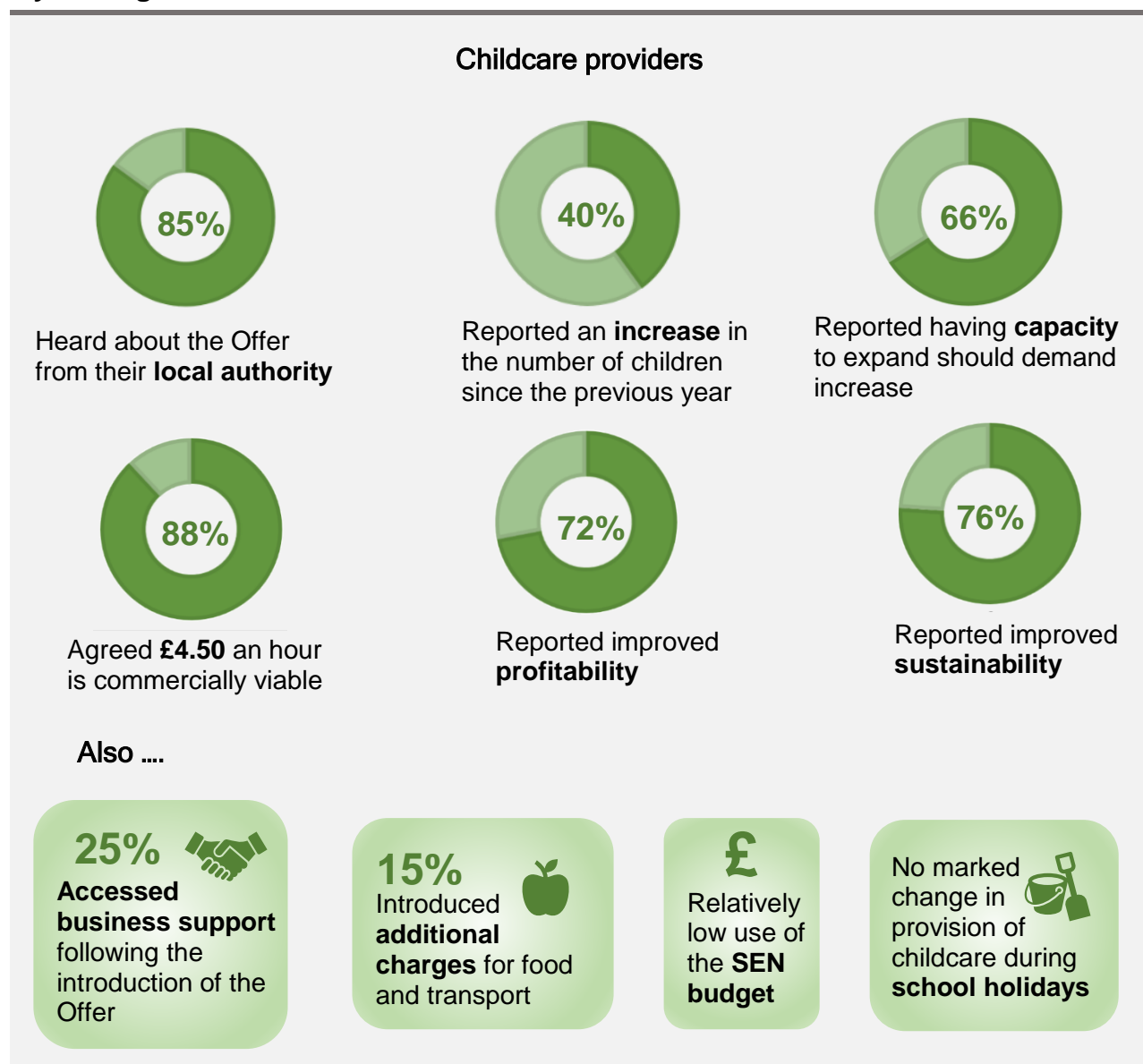
EILA Offer teams' **direct engagement** with childcare settings was welcomed by childcare providers and this was effective in raising awareness of the Offer. The majority of childcare providers reported that signing up for the Offer was straightforward, as was submitting information for payment. The different number of hours of FPN provision offered within, and across EILAs, affected the number of hours of the childcare strand of the Offer that eligible children could access.

EILAs' engagement with parents involved **raising awareness** of the Offer as well as receiving and processing applications for the Offer;

- EILAs' awareness-raising activities were focused on the selected pilot areas;
- Ensuring accuracy of information was critical as 'word of mouth' was key for childcare providers when communicating the Offer to parents;
- Maintained school settings delivering FPN were not involved in the early implementation processes and, as a result, were less involved in raising awareness of the Offer among parents;
- EILAs estimated 40-60 per cent of initial applications had missing or out-of-date eligibility evidence;
- Some EILA Offer teams invested considerable time in supporting parents to provide eligibility evidence.

The Offer's influence on providers

Key findings



The majority of childcare providers reported that submitting monthly invoices and returns on the number of children booking and taking up places funded by the Offer to be 'simple and quick', once initial technical issues had been resolved. Initial reservations that some childcare providers had about the rate, timings of payments and onerous administration proved to be unfounded.

Change in demand for places reported by childcare providers included;

- **No evidence** of a big surge in enquiries for childcare which some providers had anticipated.
- Forty per cent of providers (60 of the 150 interviewed) had **seen an increase** in the number of children at their setting during the past year, and for most, this was totally or partly influenced by the Offer.
- Some **sessional day care providers** interviewed (10 out of 36) had **extended their opening hours**; a few noted that they also planned to open during the **school holidays** for the first time.
- Fewer (3 out of 47) **full day nurseries** reported extending their opening hours.
- **No evidence** of childcare providers decreasing their delivery of **FPN provision** in order to provide more childcare funded by the Offer. However, a small number (six) noted that they **may consider changes** of this kind **in the future**.

Some stakeholders' comments on the commercial viability of the Offer reflected the importance of ensuring that the hourly rate is regularly reviewed, rises in line with inflation and takes account of sector-specific cost increases.

Childcare providers reported improved sustainability (76 per cent) and profitability (72 per cent) as a result of the Offer, and noted that this was mainly due to:

- **Higher hourly rates** received through the Offer compared to the provider's usual fee rates.
- **Increase in the hours** of childcare taken **by existing customers** who now accessed the Offer.

Many childcare providers also reported that maintaining a mix of children of different ages at their setting was important to their future sustainability, and as such they were keen to continue accepting children younger than aged three. Other points relating to the commercial viability of the Offer reported by providers and stakeholders include:

- The minimum **staff ratios** for childcare influences commercial viability and can influence the ability and willingness of providers to take on additional children.
- **Timing of payments from EILAs.** The majority of providers interviewed (94 per cent) noted that their payments were received in a timely and accurate manner.
- Most childcare providers (**75 per cent**) **had not accessed any business support** during the first year of implementation. Many of those who reported that they had accessed support noted that they had gained this from childcare sector representative organisations and that the focus of this was mainly on training and policy updates as opposed to business planning.

The **delivery cost** per child had not changed as a result of the Offer for most (90 per cent) of childcare providers interviewed. Childcare providers who reported increased costs attributed this to the additional administrative tasks associated with the Offer.

Some providers interviewed (**15 per cent**) **had introduced additional charges** for food and transport as a result of the Offer. Some of these increased charges may have occurred in any case. Some charges were introduced to make up for the shortfall in fee revenue they incurred as a result of the Offer.

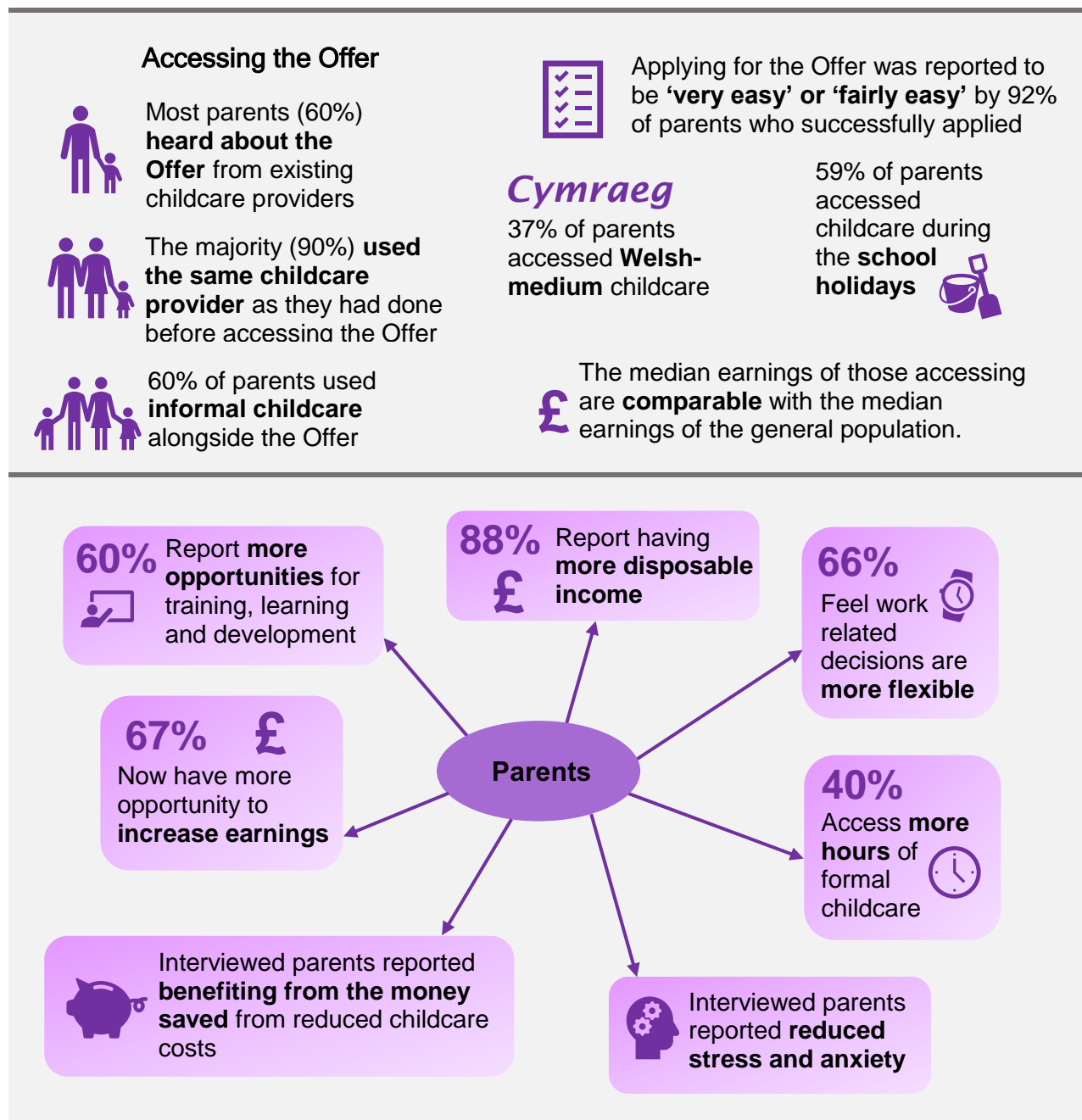
Any additional hours of childcare accessed beyond those supported by the Offer are charged directly to the parents. Some **variation in the charging structure** used by providers to invoice parents for these **additional hours** were noted.

Special Educational Needs (SEN) provision: Each EILA was allocated a budget ringfenced for the provision of SEN support. However, there has been relatively low use of this budget, mainly because of uncertainty among EILAs as to how to use the budget.

There is no evidence to date of a movement away from **Welsh-medium childcare** as a result of the Offer. The 15 cylchoedd (Welsh-medium playgroups) interviewed were more likely than other providers to report positively on profitability and sustainability, and all 15 reported that £4.50 an hour was viable.

The Offer's influence on parents

Key findings



Awareness of the Offer: In addition to hearing about the Offer directly from providers, parents also heard about the Offer through word of mouth and local authority letter or leaflet (for 26 and 24 per cent of parents respectively). Providers and EILA Offer teams reported that some parents were initially wary of the Offer, often lacking trust in something that seemed 'too good to be true' or assuming that as working parents it was not for them. Parents not accessing formal childcare were less likely to hear about the Offer.

Some parents were initially confused about the **eligibility criteria**, particularly the emphasis placed on working 16 hours. Most parents (92 per cent) thought that the application process was straightforward; where there were difficulties reported it was around providing the required documentation and the application being time-consuming to complete.

Who is accessing the Offer?

- The **median salary band** of individual parents accessing the Offer during early implementation was £20,800 - £25,999.
- The median earnings of those accessing the Offer appear to be **comparable with the median earnings** of the general population in Wales.
- 60 per cent of parents accessing the Offer were **earning the equivalent of, or below**, the Wales median salary.
- 30 per cent of individual parents accessing the Offer were **earning £15,599 or less**.
- The **median salary for the lowest earner** in each household accessing the Offer was £15,600 - £20,799.

Most parents accessing the Offer (94 per cent of survey respondents) were ones who **already used formal childcare**. Of the 60 per cent of parents who reported they were using informal childcare alongside the Offer, 16 per cent noted they were now using less informal childcare.

Holiday provision: Fewer parents accessed childcare during the school holidays than initially anticipated. Some of parents interviewed (seven out of 32) noted they were unable to access the childcare provision they required during school holidays.

Welsh-medium provision: On average over the first year 37 per cent of children supported by the Offer accessed Welsh-medium childcare provision, with the proportion varying across EILAs. The survey findings indicate that the proportion of parents able to access Welsh-medium and bilingual provision, before and after the Offer was introduced, has remained broadly the same.

Impact on parents' employability: The majority (86 per cent) of parents surveyed reported that they currently work the same number of hours as before the Offer. However, 67 per cent reported having more flexibility in the types of jobs they do and the hours they work and 60 per cent reported having more opportunities for training.

The main reason parents reported for **not accessing the Offer** was that their existing childcare provider had not registered to deliver it. Some parents noted that it was difficult for them to understand how the Offer and tax credits fitted together; these parents were of the view that they would be financially better off not accessing the Offer so that the tax credits remained unchanged.

Conclusions

The evaluation of the first year of the early implementation of the Childcare Offer in Wales has highlighted a number of benefits and challenges associated with developing, delivering and accessing the Offer.

Early implementation

All early implementation local authorities had established agreements and processes with local childcare providers to deliver the Offer and were able to receive applications from parents by the middle of the summer of 2017. Almost all eligible parents who had successfully applied for the Offer were able to access the childcare they needed by September 2017. Much of this success can be attributed to the good communication and working relationships between the Welsh Government and their local authority colleagues. The enthusiasm of the Offer teams in the seven local authorities also played a key role. The challenge moving forward will be to encourage the same level of enthusiasm and good working relationships with the new implementer areas.

Some early teething problems were encountered with the payment systems to providers in some areas but were quickly resolved in most cases. A more sustained challenge reported by the EILAs has been the larger-than-expected administration burden associated with processing applications from parents. This was particularly challenging for applications from parents who were self-employed and those working zero-hour contracts or working irregular hours.

Communication and awareness raising

EILA Offer teams invested considerable time during the first half of 2017 engaging directly with local childcare providers. This was largely successful despite the fact that there were some important gaps in the information available at the start, particularly in relation to the hourly rate. The majority of childcare providers welcomed the direct and ongoing contact they had with their EILA Offer teams.

As the Offer was only available in selected areas, the communication and promotional activities had to be targeted, and this placed limitations on the potential reach of the

promotional activities. Information to parents was mostly delivered by childcare providers, and most parents heard of the Offer from their existing childcare providers. While this process worked well it meant that those parents not using formal childcare were less likely to be aware of the Offer.

Impact on the childcare sector

The introduction of the Childcare Offer for Wales has not, to date, prompted any major changes in the providers' delivery patterns. The majority of providers interviewed (90 per cent) reported that they had not yet changed any of their delivery approaches nor extended their opening hours in response to the Offer. Providers who had extended their operating hours were mainly sessional playgroups. Over half of the providers noted no change in the number of children registered at their setting. Of those who did record an increase in the number of children (40 per cent), two-thirds reported that this was due to the Offer. Two-thirds of providers noted that they had seen an increase in the number of hours of childcare used by existing customers, and much of this influenced by the Offer.

Few providers noted any concerns about their capacity to accommodate the current demand for childcare places generated by the Offer, although many childminders did note that they were already operating at, or near, full capacity. Other providers noted that although they had the capacity to accommodate more children, they had no wish to take on any more as they feared expanding provision could adversely affect the character of their setting.

Commercial viability: The majority of providers consider the payment rate of £4.50 an hour to be commercially viable. Almost three-quarters are of the view that delivering Offer-funded childcare has improved the profitability and sustainability of their business. However, stakeholders and some providers commented on the importance of ensuring that the Offer hourly rate is regularly reviewed, rises in line with inflation and takes account of any future sector-specific cost increases.

For the majority of providers (90 per cent) the delivery cost per child has not changed as a result of the Offer. Some providers (15 per cent) had introduced additional charges for food and transport. A minority (4 per cent of the 150 asked) had increased their fee rate for all

parents as a result of the Offer. The methods and amounts of additional charges vary, although in some cases they have been introduced to ensure that delivering the Offer remains commercially viable. This may suggest the need for further guidance for providers on the introduction of additional charges.

The median salary band of individual parents accessing the Offer during early implementation was £20,800 - £25,999 and 60 per cent of parents accessing the Offer were earning the equivalent of, or below, the Wales median salary.

The majority (90 per cent) of parents accessing the Offer used the same childcare provider as they had done before accessing the Offer. The Offer had encouraged 40 per cent of parents to access more hours of formal childcare. Most parents (60 per cent) reported they used a combination of informal and formal childcare.

Foundation Phase Nursery provision

The minimum of 10 hours of FPN provision and up to 20 hours of funded childcare provision available through the Offer are often delivered in separate settings. There are a few examples of parents making a choice between accessing FPN or childcare. However, these decisions are not necessarily influenced by the Offer. The introduction of the Offer has, however, highlighted some of the challenges that already exist for some parents in relation to accessing FPN and childcare provision.

Some non-maintained settings deliver FPN as well as formal childcare to rising threes (the term following a child's third birthday). The rate at which some of these providers are paid to deliver FPN is often lower than the rate paid to deliver childcare funded by the Offer. This has led some providers to consider substituting FPN provision for Offer-funded childcare provision. However, no evidence has emerged of providers changing their provision in this way yet.

Welsh-medium provision

The proportion of parents able to access Welsh-medium and bilingual provision, before and after the Offer was introduced, has remained broadly the same. There is no evidence to date of a movement away from Welsh-medium childcare as a result of the Offer.

Holiday provision

Parents who are eligible for the Offer can access 30 hours of funded childcare during nine of the thirteen weeks of school holidays. Some concerns were raised at the outset that this could lead to a situation where demand for childcare during school holidays would exceed available provision. However, fewer parents accessed childcare during the school holiday periods than anticipated. However, seven of the 32 interviewed parents noted they were unable to access the childcare provision they required during school holidays.

Special Educational Needs (SEN) provision

There has been a relatively low use of the SEN budget allocated to each EILA. Those who have used the budget have used it to support activities such as one-to-one support, specialist advice, training and 'backfilling' to facilitate staff training sessions for providers.

Impact on employment prospects

The Childcare Offer in Wales has led to some positive, but not significant, impact on the employment prospects of parents supported by it. The majority (86 per cent) of parents reported that they currently work the same number of hours as before the Offer. However, 10 per cent noted that they work more hours; 67 per cent reported having more flexibility in the types of jobs they do and the hours they work and 60 per cent reported having more opportunities for training. Those who did report improved employability as a result of accessing the Offer were mostly women and parents from lower earnings groups.

The majority (88 per cent) of parents also reported having more disposable income as a result of accessing the Offer. This was mainly due to their reduced childcare costs. Two-thirds of surveyed parents reported that the Offer gave them more opportunities to increase their future earnings.

Recommendations

The following recommendations are informed by findings that have emerged from the evaluation of the first year of the early implementation of the Childcare Offer in Wales.

- Further consideration should be given to ensure that application processes are as straightforward as possible for all parents. This would include ensuring that self-employed individuals, contract workers and those on zero-hour contracts can demonstrate proof of employment, and therefore access the Offer, as easily as parents in other forms of employment.
- As we move closer to national rollout a more centralised approach to promoting and awareness raising should be considered. This could be linked to further information relating to the eligibility criteria for parents and their access to funded childcare during school holidays.
- More and clearer information may be needed to help parents work out childcare costs taking into account other benefits available to them including child tax credit.
- Consider further alignment between the provision of childcare and the delivery of FPN in relation to access for parents and funding arrangements. This could include co-location but could also include transport to and from settings as well as the joint provision of other wraparound childcare arrangements. Linked to the recommendation above, closer working relationships may be required between schools delivering FPN and childcare providers.
- Further guidance to providers may be required to ensure a consistent approach to charging for additional hours across all childcare settings delivering the Offer.
- Take-up of business support among childcare providers appears to have been low during the first year of early implementation. Further promotion of the support already available to providers should, therefore, be considered.
- Further guidance to EILAs may be required regarding the use of the SEN budget available through the Offer.
- Further research is needed over a longer period of time, in order to provide conclusive evidence on impact. The feasibility of linking to government administrative data records (e.g. HMRC employment records) to support this evidence gathering should be explored further.

- Individual EILAs have produced a large quantity of good quality monitoring data. In order to fully utilise this data during further monitoring and evaluation of the Offer, further considerations may be required to ensure that this data is presented and recorded in a consistent manner across all EILAs.

1. Introduction

- 1.1 Arad Research, in association with NatCen Social Research, was commissioned in August 2017 to undertake the evaluation of the first year of early implementation of the Childcare Offer for Wales. The evaluation was tasked with the following main aims:
- Evaluate how effectively the Childcare Offer is being delivered to children and parents in the early implementer areas and provide lessons to inform future delivery.
 - Evaluate the impact that the Childcare Offer for Wales is having on parental employability, wellbeing and disposable income (linked to poverty) – likely to be limited in the first year.
 - Evaluate the impact of the Childcare Offer for Wales on the childcare sector, looking at the effect on different types of childcare providers, changes to business practices and the effect of intervention into the childcare market.
- 1.2 In order to consider the way in which the Childcare Offer (the Offer) worked during the first year of early implementation the evaluation focused on the process as well as early impact. The process evaluation examined the early delivery of the Offer, focusing on communication, administration, accessibility, childcare sector capacity, Welsh-medium provision, Special Educational Needs (SEN) provision as well as the level of funding, and the payment mechanism. It also looked at the alignment of the Offer with the Early Years Foundation Phase and other Welsh Government programmes such as Flying Start and PaCE. The process evaluation also looked to consider any unintended consequences regarding the impact on profitability and sustainability for providers, and whether any additional costs were being passed on to parents. The key areas included in the impact evaluation were parents' attitude to work and any impact on their employability and income.
- 1.3 The evaluation was informed by desk-based research, analysis of Childcare Offer monitoring data, and interviews with stakeholder organisations, Early Implementer Local Authority (EILA) teams, Welsh Government officials, childcare providers and

eligible parents (a sample of both those accessing and not accessing the Offer), as well as a survey of parents accessing the Offer. Further details of the evaluation methods are presented in section 2 of this report.

Welsh policy context

- 1.4 The importance of prioritising the first few years of a child's life, 'the early years', and trying to make it easier for working families to take up and retain employment is highlighted in *Prosperity for All*¹, with the strategy setting out that through the delivery of the Childcare Offer,

We will provide working parents of 3 and 4-year-olds with 30 hours of free early education and childcare for up to 48 weeks a year, delivered in a way that works for parents and children.²

- 1.5 Building on the Welsh Government strategies such as *Nurturing Children, Supporting Families, Welsh Government Policy Statement*,³ which referred to the dual benefit of employment and children's development, the Welsh Government's *Building a Brighter Future: The Early Years and Childcare Plan*⁴ outlined the importance of early years education and childcare for children's development, as well as supporting parents' access to employment or training. More recently, the Welsh Government's 10 Year *Childcare, Play and Early Years workforce plan*⁵ commits to providing priority investment to support building capacity and capability across the childcare sector.
- 1.6 Across Wales, local authorities are required to provide a minimum of 10 hours a week of Early Years Education, delivered through the Foundation Phase Nursery Provision (FPN) for three to four-year-old children in term time. The 30 hours included in the Childcare Offer for Wales includes a combination of FPN and funded

¹ Welsh Government (2017) [Prosperity for All: the national strategy](#). Cardiff: Welsh Government.

² Welsh Government (2017) [Prosperity for All: the national strategy](#). Cardiff: Welsh Government. p. 23.

³ Welsh Assembly Government (2011) [Nurturing Children, Supporting Families, Welsh Assembly Government Policy Statement](#). p. 4. Cardiff: Welsh Assembly Government.

⁴ Welsh Government (2013) [Building a Brighter Future: The Early Years and Childcare Plan](#). Cardiff: Welsh Government.

⁵ Welsh Government (2017) [Childcare, Play and Early Years Workforce Plan](#).

childcare provision. The ratio of FPN to childcare funded hours available to eligible children is dependent on the number of FPN hours already provided in each area. The hours of FPN provision available varies between local authorities (and in some cases between FPN providers within the same local authority). As such, the number of childcare hours available to make up the 30 hours of the Offer also varies across and within local authorities.

1.7 The Welsh Government's strategies and plans outlined above have supported progress in the delivery of early education and childcare in Wales. This progress includes the following:

- The Foundation Phase Nursery Provision (FPN) – a minimum of 10 hours a week of early education for three and four-year-olds during term time funded by The Welsh Government, from the term following a child's third birthday.
- A wide range of childcare providers – including childminders, full day care nurseries, sessional playgroups and holiday clubs, are available across Wales. Care Inspectorate Wales (CIW) reported 4,137 childcare and play services, providing 83,065 childcare places in March 2018.⁶
- Flying Start – 12.5 hours a week of funded childcare over 39 weeks provided for eligible two to three-year-olds. The number of children who benefited from Flying Start services 2017-18 was 36,869, this included 7,884 newly eligible children taking up a full or reduced offer of childcare.⁷
- Mudiad Meithrin has been awarded an extra two million pounds of Welsh Government funding over two years to help the organisation contribute towards reaching a million Welsh speakers by 2050. The funding will support Mudiad Meithrin contribute to the target set in Cymraeg 2050⁸ to

⁶ StatsWales (2018) [CIW Services and Places by Setting Type and Year](#).

⁷ Welsh Government (2018) [Statistical First Release, Flying Start, summary statistics 2017-18](#). p. 1 and 31.

⁸ Welsh Government (2017) *Cymraeg 2050: A million Welsh speakers*. [Online]. [Accessed 2 November 2018] and Welsh Government (2017), *Cymraeg 2050: A million Welsh speakers - Work programme 2017-21*. [Online].

expand Welsh-medium provision by 40 Welsh-medium nursery groups by 2021 and by 150 Welsh-medium nursery groups by 2027.

- Parents, Childcare and Employment (PaCE) – assists economically inactive parents, outside Community First areas, into training or employment where childcare is their main barrier.
- The Welsh Government also provides grants to encourage the creation of new childcare places across Wales.
- Tax-Free Childcare – the UK Government initiative available across the UK since early 2017, which is replacing the existing Childcare Voucher Scheme.
- Childcare support from the UK Government via tax credits and Universal Credit.

Poverty

- 1.8 The initiatives listed above have taken place against a backdrop of persistently high economic inactivity in Wales (comparative to the UK), reduced living standards and changes to the welfare system across the UK. The programmes above attempt to redress such issues and demonstrate the role early education and childcare plays in supporting families into employment and out of poverty.
- 1.9 The *Child Poverty Strategy for Wales* outlines the importance of providing affordable and accessible childcare to support families living in poverty to achieve better outcomes.⁹ The *Families First* Programme supports families who need help in Wales, with each local authority able to focus their delivery to meet the families in their local area.¹⁰ *Communities for Work* targets those furthest from the labour market, seeking to increase their employability and move them closer to employment. A fund to cover the short-term cost of childcare was an element of the ‘barriers fund’ for this programme. Two to three-year-old children living in

⁹ Welsh Government (2015) [Child Poverty Strategy for Wales](#). Cardiff: Welsh Government. [Accessed 2 November 2018]

¹⁰ More information on [Welsh Government's Families First Programme](#).

disadvantaged areas of Wales are eligible for 12.5 hours a week of free childcare as part of *Flying Start*.¹¹

- 1.10 Analysis undertaken in 2015 of the potential impact of the Welsh Government-funded Childcare Offer for three to four-year-olds in Wales concluded that there would not necessarily be any 'substantial impact on net income, poverty or work behaviour for families with children'.¹² and that any saving in childcare spending could be 'partially offset by reductions in reimbursements for costs' from tax credits, Universal Credit and Tax Free Childcare. However, the analysis in this report was based on 38 weeks of childcare rather than 48 weeks.¹³
- 1.11 The National Survey for Wales found that 43 per cent of parents found it difficult to afford childcare¹⁴, It also found that 76 per cent of parents needing childcare reported using 'family or friends', with 26 per cent combining unpaid informal and paid formal childcare.

Employability

- 1.12 Employability is another Welsh Government priority emphasised in the *National Strategy*, with the cross-cutting *Employability Plan* citing the help parents will receive from PaCE, and the Childcare Offer, as being key to providing individualised employability support for parents.¹⁵ PaCE is designed to support those furthest from the employment market with childcare, again aimed at reducing poverty and tackling social inequalities. Having engaged with PaCE initially, and receiving support for childcare costs, parents can then access the Childcare Offer once they start to work.¹⁶¹⁷

¹¹ Further information on [Welsh Government's Flying Start Programme](#)

¹² Public Policy Institute for Wales (2015) [Childcare Policy Options for Wales](#). p. 19.

¹³ National Assembly for Wales (2018) [Childcare Funding \(Wales\) Bill Committee Stage 1 Report](#). p. 80-81

¹⁴ Welsh Government (2018) [Statistical Bulletin, National Survey for Wales 2016-17 Childcare](#).

¹⁵ Welsh Government (2018) [Employability Plan](#). Cardiff: Welsh Government. p. 13.

¹⁶ Welsh Government (2018) [Employability plan, Progress report 2018](#). p. 25.

¹⁷ Welsh Government (2018) [PaCE helps 1000th parent into employment](#). [Online]

- 1.13 The introduction of Universal Credit and Tax-Free Childcare, and changes to the welfare system, have also impacted to a greater or lesser extent on families across Wales.
- 1.14 The effect on women's employment after having children suggests that women are more likely to leave their jobs, with them encountering difficulties in finding flexible employment to fit around childcare.¹⁸ The Welsh Government's engagement campaign - #TalkChildcare – also reported the cost of childcare as a barrier for working parents, with the flexibility of having early opening hours also important to parents.¹⁹
- 1.15 The importance of affordable, accessible and flexible early years childcare has been recognised in Wales, and this is reflected within the policies and programmes mentioned above, which aim at supporting families through their children's early years.

Well-being of Future Generations

- 1.16 *Well-Being of Future Generations (Wales) Act* became Law in April 2015.²⁰ The Act is about improving the social, economic, environmental and cultural well-being of Wales, now and in the future. The Offer will contribute to local authorities' ability to think more about the long term; work better with people and communities and each other and look to prevent problems; and take a more joined-up approach to childcare and education.

The current landscape of the childcare sector in Wales

- 1.17 In March 2018, there were 4,137 childcare providers registered with Care Inspectorate Wales (CIW).²¹ The majority of these childcare providers are childminders (53 per cent). The remaining childcare is delivered by full day care

¹⁸ National Assembly for Wales (2018) [Work it out: parenting and employment in Wales](#). p. 17.

¹⁹ Welsh Government (2017) [#TalkChildcare Campaign](#). [Online]

²⁰ Future Generations Commissioner for Wales (2018) [Well-being of Future Generations \(Wales\) Act 2015](#). [Online]

²¹ StatsWales (2018) [CIW Services and Places by Setting Type and Year](#).

settings (18 per cent), sessional day care (17 per cent), out of school settings (10 per cent), open access play provision (1 per cent) and crèches (0.5 per cent).²²

- 1.18 The current total number of childcare places in Wales is 83,065 (in 2013 there were 75,944 places).²³ Full day care provides the most places (38 per cent), with childminders, out of school care and sessional care all providing around 19 per cent of the rest of the places each.
- 1.19 CIW regulates childminding, day care and play provision for children up to 12 years of age. Registered childcare settings delivering FPN are also inspected by Estyn. Table 1.1 provides definitions of the different types of childcare.

²² Percentages rounded.

²³ StatsWales (2018) [*CIW Services and Places by Setting Type and Year*](#).

Table 1.1. Definitions of different types of childcare

Childcare	Definition
Childminding	Childcare provided by one or more people for children from birth to the age of 12 years within domestic premises that is not the child's own home for more than two hours per day for reward.
Full day care	Full day care for children from birth to up to the age of 12 years, provided for a continuous period of four or more hours in any day, in non-domestic premises.
Sessional day care	Childcare for children aged two onwards on non-domestic premises which is for less than a continuous period of four hours in any one day.
Out of school childcare	The total care for children aged up to 12 years is more than two hours in any day and for more than five days a year. Refers to childcare outside of the child's full-time school day.
Open access play provision	Staffed provision operating for over two hours a day for children up to the age of 12 years can be permanent or temporary, located in a variety of settings with or without premises and can include holiday play schemes.
Crèches	Occasional day care for children aged from birth up to the age of 12 years on non-domestic premises. Crèches need to be registered where they run for more than two hours a day and more than five days a year.

Source: [Welsh Government \(2016\) National Minimum Standards](#) for Regulated Childcare for children up to the age of 12 years. p. 5-7.

- 1.20 Wraparound care is provided by childcare settings for those children attending school or nursery part-time for their FPN, with the wraparound element of the childcare provided before and/or after this.
- 1.21 Children are eligible to access FPN in the school term following their third birthday. Children who turn three years old before the end of December can attend two terms of FPN prior to the full nursery year. These children are referred to as the 'Rising Threes'. Some non-maintained childcare providers (privately owned) only deliver the Rising Threes element of the Foundation Phase, with children moving on to a maintained nursery attached to a local authority funded primary school for the full year before entering their Reception year.
- 1.22 A recent survey of the childcare sector in Wales estimated that around 65 per cent of childcare settings were private providers, 18 per cent voluntary (e.g. playgroups)

and 12 per cent public.²⁴ A review of the childcare capacity in Wales reported that childminders are largely clustered in the south east and north Wales. Full day care provision is also clustered in the same regions, but very few full day care providers are located outside urban areas. Sessional care is more evenly distributed across Wales but still focused in the south east and north.²⁵

- 1.23 The *National Minimum Standards for Regulated Childcare* stipulate the maximum number of children who can be cared for within each of the different childcare settings.²⁶ The maximum number of children a childminder can care for is ten children up to the age of 12 years. No more than six of these children may be younger than eight years old and of those six, no more than three may be under the age of five years old, with no more than two of the under-fives younger than 18 months old.
- 1.24 In child day care settings in Wales, the minimum staffing ratios are;
- one adult to three children under two years
 - one adult to four children aged two years
 - one adult to eight children aged three to seven years
 - one adult to ten children aged eight to twelve years.
- 1.25 Open access play provision requires one member of staff for every 13 children aged under eight years (children younger than five years do not generally attend this type of provision).
- 1.26 Welsh Government intend for the childcare and play workforce in Wales to be skilled and highly regarded as a profession and career choice.²⁷ Key stakeholders, including local authorities, Social Care Wales, Cwlwm and PETC Wales are working in partnership to implement the 'workforce plan', which is focused on supporting individuals working in childcare or play with children aged 0-12 years.

²⁴ Alma Economics (2018) [Review of the Childcare Sector in Wales](#). Cardiff: Welsh Government. p. 8.

²⁵ Welsh Government (2017) [Childcare capacity in Wales, mapping childcare supply with demand](#). p. 14.

²⁶ Welsh Government (2016) [National Minimum Standards for Regulated Childcare for children up to the age of 12 years](#). p. 39.

²⁷ Welsh Government (2017) [Childcare, Play and Early Years Workforce Plan](#). p. 5.

- 1.27 Around 23,300 people work with our youngest children in childcare settings and Foundation Phase settings (including 5,800 as Foundation Phase classroom assistants) according to figures from the Welsh Government's 10-year Workforce Plan.²⁸ A large proportion of the childcare workforce in Wales work part-time hours, and even though qualification levels are increasing, wages remain low.
- 1.28 The Offer is intended to provide a catalyst for the transformation of the childcare sector; with Welsh Government recognising the need to 'build capacity and capability across the sector'.²⁹ Under the 10-year workforce plan, new childcare qualifications will be introduced in September 2019 which 'will offer a vocational learning and progression route for the sector'.

Development of the Childcare Offer for Wales

Wider UK context

- 1.29 Other nations of the UK deliver similar programmes to the Childcare Offer for Wales which also support working parents with childcare. For example, prior to national rollout in England in September 2017,³⁰ the Department for Education tested their programme; April 2016 saw 32 local authorities testing how the 30 hours of extended early education could be supported in different localities; in September 2016 eight local authorities delivered extended hours to test flexibility and capacity of provision, with early rollout in four local authorities in April 2017.^{31,32} The Childcare Offer in England is based on the school term-time schedule, with no additional holiday provision. Further detail is contained in Annex A.
- 1.30 Scotland is currently expanding the entitlement to free early learning and childcare, by 2020 it will almost double to 1140 hours per year for all three and four-year-olds and eligible two-year-olds, having increased from 475 to 600 hours per year since

²⁸ Welsh Government (2017) [Childcare, Play and Early Years Workforce Plan](#). p.9.

²⁹ Welsh Government (2017) [Prosperity for All: economic action plan](#). p. 20.

³⁰ Paull, G. and La Valle, I. (2018) [Evaluation of the first year of the national rollout of 30 hours free childcare Research report September 2018](#).

³¹ Paull, G., La Valle, I., Speight, S., Marshall, L. and White, C. (2017) [Evaluation of Early Rollout of 30 hours Free Childcare Research report August 2017. UK: Frontier Economics](#). p. 26.

³² Paull, G., La Valle, I., Speight, S., Jones, H. and White, C. (2017) [Evaluation of Early Implementation of 30 hours Free Childcare Research report July 2017](#). UK: Frontier Economics.

2014.³³ Between 2016 and June 2018, 14 Scottish local authorities trialled the extended hours.³⁴³⁵ Further information on childcare in Scotland can be found in Annex A.

- 1.31 Currently, the funded pre-school education available in Northern Ireland is similar to that delivered in other parts of the UK, i.e. 2.5 hours a day, five days a week during term-time for three to four-year-olds. However, a consultation process was recently completed to inform the development of a new childcare strategy. It is important to note that increasing provision to 30 hours was proposed by some respondents to the consultation.³⁶ One of the strategy's main aims is that 'parents are not prevented from joining the workforce'.³⁷

Wales

- 1.32 Prior to the introduction of the Offer, families could receive Welsh Government-funded early education and childcare through two key schemes, both of which remain in operation. The first of these is delivered through Flying Start, the early years' programme which offers 12.5 hours a week of childcare to two-year-old children, living in disadvantaged areas of Wales, until they turn three. The second is the Foundation Phase Nursery Provision (FPN), a universal scheme which offers all children in Wales a minimum of 10 hours a week of government-funded early years education from the school term following their third birthday, in term time. Through the Foundation Phase, eligible children are offered part-time education in local authority approved settings, mainly schools but also day nurseries and funded playgroups.

³³ The Scottish Government (2017) [*A Blueprint for 2020: The expansion of early learning and childcare in Scotland 2017-2018 Action Plan*](#).

³⁴ Scottish Government (2017) [*The Expansion of Early Learning and Childcare: Evaluation Report*](#) 2017. p. 9.

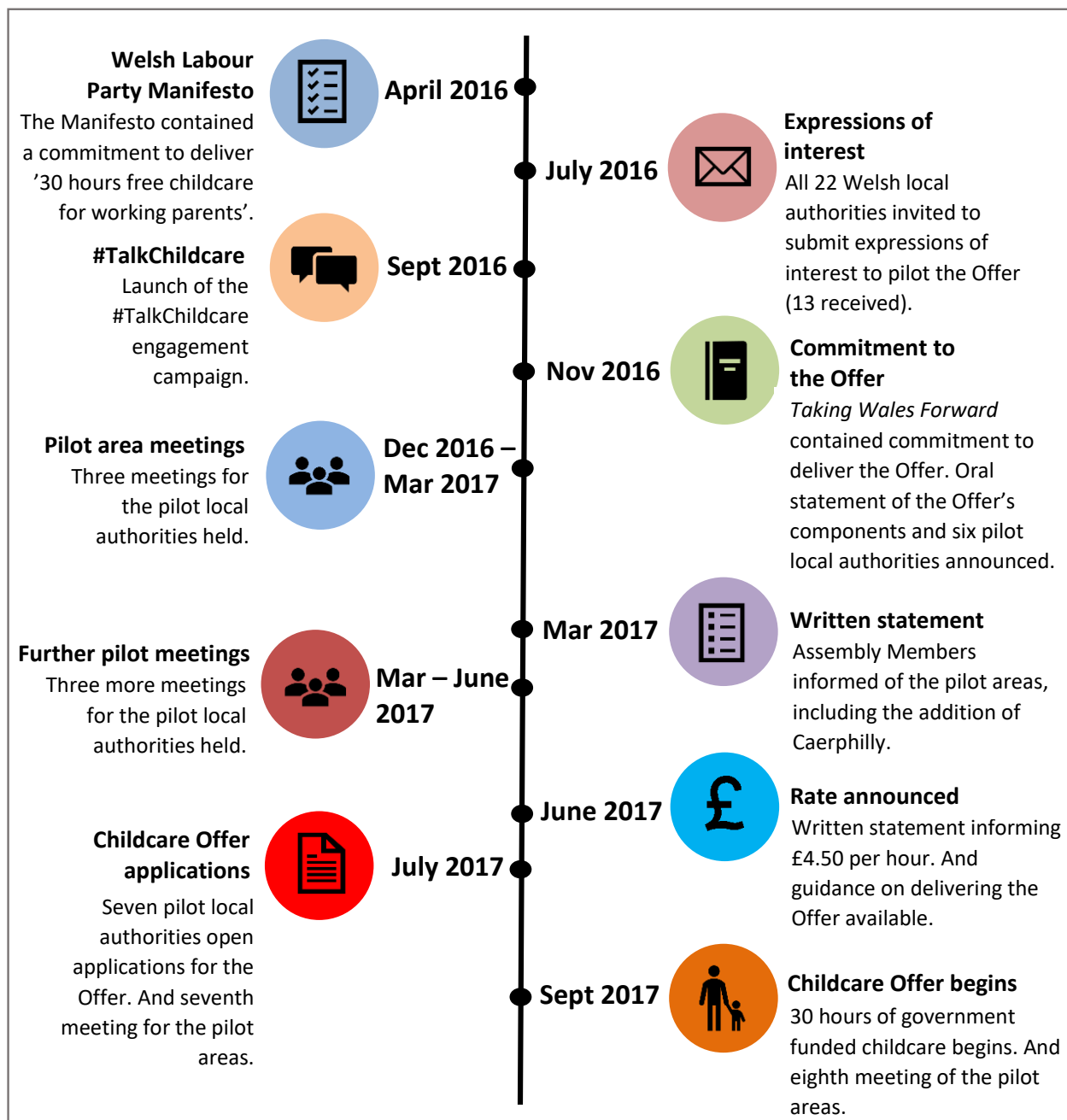
³⁵ Scottish Government (2018) [*Evaluation of the Early Learning and Childcare Delivery Trials*](#).

³⁶ Department of Education Northern Ireland (2018) [*Summary report of responses to the consultation. Delivering Social Change Through Childcare. a ten year strategy for affordable and integrated childcare*](#). p. 10.

³⁷ Northern Ireland Executive (2015) [*Delivering Social Change Through Childcare. A Ten Year Strategy for Affordable and Integrated Childcare*](#). p. 10.

- 1.33 Under the Offer, the Foundation Phase provision is topped up with additional hours of childcare which are available for the children of working parents who meet the eligibility requirements.
- 1.34 Figure 1.1 provides an overview of the development of the Childcare Offer for Wales up to the launch in the selected pilot local authorities in September 2017. Further detail on the rationale and development of the Offer is found in Section 3.2.

Figure 1.1. The development of the Childcare Offer for Wales



1.35 In September 2017, the Welsh Government began the early implementation of the Offer to test provision of 30 hours a week of government-funded early education and childcare for working parents of three and four-year-olds. During the first year of early implementation (September 2017 to August 2018), the Childcare Offer for Wales was provided to children of eligible parents in seven selected local authorities for up to 48 weeks a year. This included nine weeks of childcare outside of school term time.

- 1.36 All parents, guardians, step-parents and long-term live-in partners within a household are eligible for the Offer if they have a child within the age range, meet the definition of a working parent, and live within one of the EILA areas. The Offer defines working parents as those who are employed, self-employed or on a zero hours contract and who earn the equivalent of working at least 16 hours a week at national minimum wage or national living wage. Both parents in a two-parent family and the sole parent in a single-parent family must be working in order to qualify for the Offer. However, there are some exceptions: for example, where one parent is working, and the other has caring responsibilities (other than for their own children) or when one parent is working, and the other is disabled or incapacitated, the working parent is eligible for the Offer. Furthermore, families that fall out of eligibility (most commonly when one or both parents lose their job), can continue to access the Offer for up to eight weeks.
- 1.37 The intended short-term outcomes of the Offer are outlined in the logic model (see also Annex B) – these include:
- Parents have more employment choices
 - Parents have increased disposable income
 - Parents can make an informed choice about using formal childcare
 - Childcare sector grows (settings and registered/skilled/trained staff) in response to increased demand and take-up of formal childcare.
- 1.38 The Offer sits alongside the Welsh Government's vision of creating a million Welsh speakers by 2050. In 2017, Welsh Government published its current Welsh language strategy *Cymraeg 2050: A million Welsh speakers* and its work programme for 2017-21 has committed to provide more government-funded Welsh-medium childcare places and strengthening Welsh-medium provision³⁸ The strategy includes a commitment to support the expansion of Welsh-medium provision by 40 Welsh-medium nursery groups by 2021 and by 150 Welsh-medium nursery groups

³⁸ Welsh Government (2017) [Cymraeg 2050: A million Welsh speakers](#). [Online]. [Accessed 2 November 2018] and Welsh Government (2017) [Cymraeg 2050: A million Welsh speakers - Work programme 2017–21](#). [Online]. [2 November 2018]

by 2030 The evaluation therefore consider the barriers that may currently exist to access Welsh-medium/bilingual provision

- 1.39 The Offer also aims to consider the barriers faced by parents of children with special educational needs (SEN). To support children with SEN to access the Offer, the Welsh Government provided additional support to local authorities to offer training, equipment, toys, and other materials and human resources, this is discussed further in sections 4.46-4.49.

Early implementation

- 1.40 Thirteen expressions of interest to pilot the early implementation of the Offer, were received by Welsh Government from 16 of the 22 local authorities, from which six early implementer local authorities were selected (November 2016), with an additional local authority announced later (March 2017). These areas were;

- Gwynedd and Anglesey County Councils, (joint working)
- Blaenau Gwent County Borough Council
- Caerphilly County Borough Council
- Flintshire County Council
- Rhondda Cynon Taf
- Swansea Council.

- 1.41 During the first year, Blaenau Gwent was the only local authority where the Offer was tested across the whole local authority. The other local authorities selected a mix of areas to test the Offer, for example selecting both rural and urban areas. More detailed information regarding specific wards delivering the Offer can be found in Annex C. The intentions of the testing during the first year was to explore such issues as the regional variations in numbers accessing the Offer, the funding rate, including additional charges, and amount of grant used, the demographics of those applying and using the Offer, the type of settings delivering the Offer, the alignment of the Offer with the Foundation Phase, any changes to parents' choice of childcare setting, when and how parents used the Offer, demand for Welsh-medium childcare, access for children with SEN and the use of the holiday provision.

Childcare Offer overview

- 1.42 A total of 743 childcare providers registered and were involved in delivering the Offer during the early implementation phase (the first 12 months). However, not all these providers were registered to deliver the Offer from the outset. The number of providers participating in the delivery of the Offer increased over time as awareness increased and as the Offer was rolled out to additional wards within local authorities.
- 1.43 Table 1.2 below presents a breakdown of these providers for each EILA and by type of provider. These figures show that childminders make up the largest proportion (two-fifths) of providers that have been involved in delivering the Offer, and out-of-school care make up the smallest proportion (less than one-tenth) of providers.

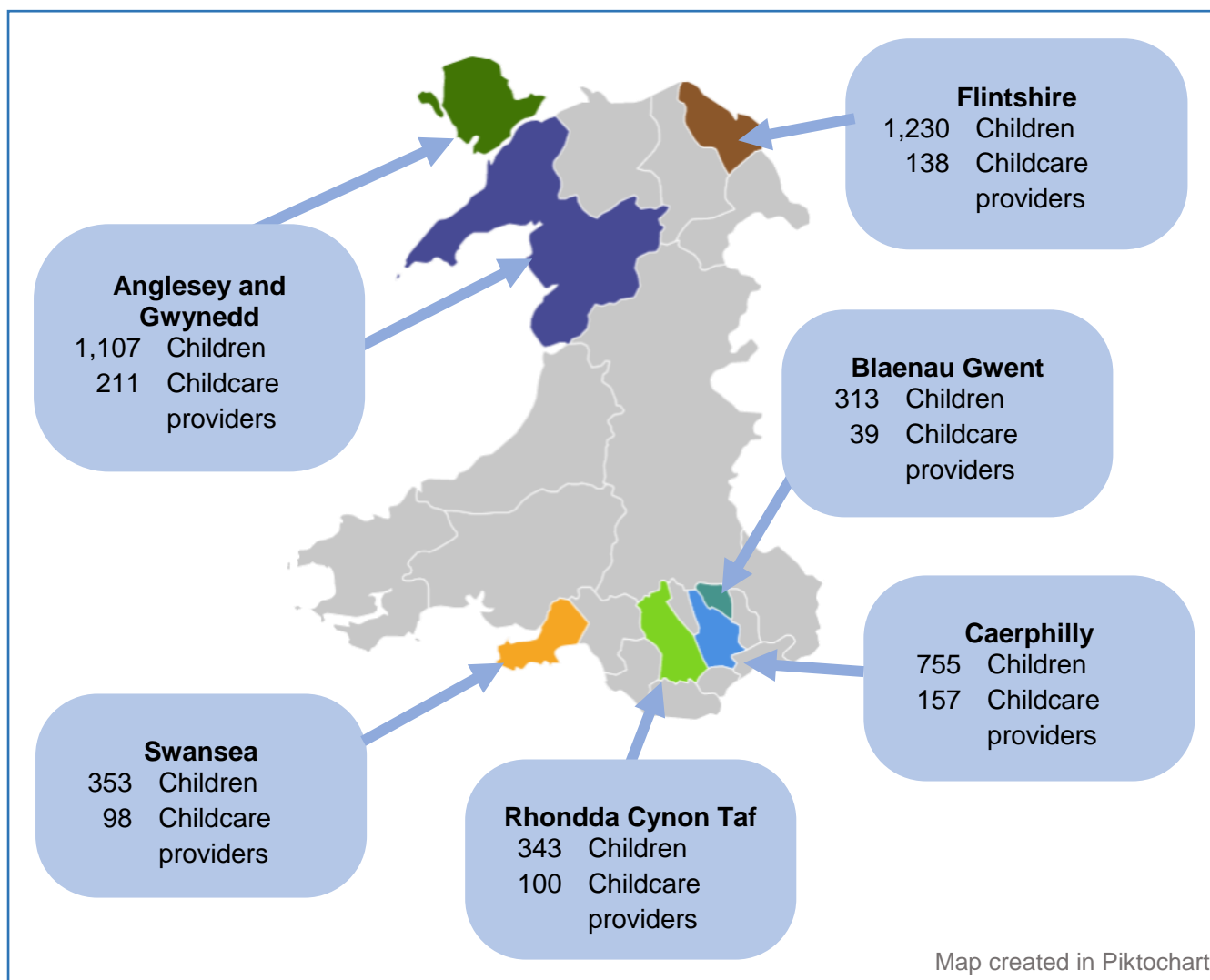
Table 1.2. Number of childcare providers delivering the Offer in each EILA, broken down by type of childcare provider (September 2017 to August 2018)

EILA	Out-of-school care	Full day care	Sessional day care	Childminders	Total no. of providers
Blaenau Gwent	1	10	8	20	39
Caerphilly	23	32	31	71	157
Flintshire	13	39	35	51	138
Gwynedd a Mon	11	33	79	88	211
Rhondda Cynon Taf	5	32	23	40	100
Swansea	0	53	1	44	98
Total	53	199	177	314	743

Source: EILA Childcare Offer monitoring data

- 1.44 The number of children accessing the Offer was lower than expected when the Offer was first launched. Numbers did increase as the Offer became more established although they remain lower than initially anticipated. Figure 1.2 below presents the overall numbers accessing the Offer during the early implementation phase of the Offer, broken down by EILA. This data is for the total number of children who have accessed childcare funded through the Offer at some point during the first year of early implementation.

Figure 1.2. The number of children accessing the Offer and childcare providers delivering the Offer in each EILA during the first year of implementation.



Source: EILA Childcare Offer monitoring data

- 1.45 Note that the data does not show the take-up rates of the Offer in each EILA – i.e. the proportion of all eligible children and parents in each area accessing the Offer. In order to calculate take-up rates, the number of children and parents accessing the Offer would need to be measured against the total number of households in each local area which have a three or four-year-old child and where both parents or guardians (or one, in the case of single parent households) meet the employment criteria of the Offer. This data does not currently exist on a local level and as such it is not possible to produce reliable data on take-up rates at this stage.

- 1.46 Data relating to the total number of three and four-year-old children in each area could be considered as a proxy indicator of potential eligibility, which could then be used to measure the number of children accessing the Offer against. However, proxy indicators of this nature would not take into account the employment status of the parents. As such, the use of proxy indicators of this nature, to estimate take-up rates of the Offer could be misleading at this stage.
- 1.47 For each term, EILAs have been required to collate information on the number of hours of childcare each parent has booked and the number of hours each child has attended. Analysis of this data has revealed that on average, parents have booked more hours than their child has attended under the Childcare Offer. Further detail is presented in Table 1.3.

Table 1.3. Average number of hours booked and attended per term per child³⁹

Term	Average no. of hours booked	Average no. of hours attended
Autumn	160	151
Spring	184	154
Summer	224	191

Source: EILA Childcare Offer monitoring data

³⁹ The average number of hours was calculated for the whole term rather than a weekly average because the monitoring data presents the hours booked and used per child either by each month or term, weekly data is not available.

2. Methodology

- 2.1 This section details the specific research questions for the evaluation and outlines the methodology adopted, including an overview of each strand of the research.

Research questions

- 2.2 The evaluation consisted of two parts – a process and impact evaluation – each of which aimed to explore specific research questions. These research questions are presented below.

Table 2.1. Research questions

Process Evaluation: Delivery

- | |
|---|
| <ul style="list-style-type: none">• Is there sufficient capacity to deliver the Offer and any increased demand that occurs as a result?• Is provision being offered in a flexible way sufficient to meet parental requirements (e.g. around working patterns, including wraparound)?• Are parents happy with the level of flexibility available to them?• How accessible and easy is it for parents to access the Offer?• How accessible and easy is it for providers to provide the Offer?• Is there sufficient capacity in the sector for children with SEN requirements to access?• Are there any barriers or opportunities provided by the Offer for children with SEN requirements?• Does current Welsh-medium and bilingual provision meet parental demand?• Are there any barriers or opportunities provided by the Offer for childcare providers?• Is the level of funding paid to providers successful in terms of ensuring sufficient capacity for the Childcare Offer to deliver, and enabling childcare providers to operate sustainably?• Are the payment delivery mechanisms from Local Authorities to childcare providers successful in allowing sufficient cash flow to providers and timely payment?• To what extent has the Childcare Offer increased the administrative burden for providers? |
|---|

Process Evaluation: Alignment

- Is there an increase or decrease in take-up of the early years foundation phase?
- How does the Childcare Offer provide a transition from flying start and PaCE for working parents?

Process Evaluation: Unintended consequences

- Has the Childcare Offer positively or negatively affected the profitability and sustainability of providers?
- What impact does the Childcare Offer have on children who are not eligible?
- Has the Childcare Offer impacted on the affordability and availability of childcare for children not eligible for the Offer (e.g. children of other ages)?
- Has there been an increase in childcare providers becoming registered as a result of wanting to be part of the Childcare Offer?
- Has the payment mechanism for the Offer prompted additional costs to be passed on to parents?
- Has there been an impact (positive or negative) on the perceived quality of childcare as a result of the Childcare Offer?

Impact Evaluation: Employment

- Is there any impact on parents' employment as a result of the Childcare Offer removing barriers to work?
- What is the impact on parents' attitudes to work and their perception of the choices available to them?

Impact Evaluation: Income and Wealth

- Do families have more disposable income as a result of the Childcare Offer?
 - To what extent, if any, has the Childcare Offer helped to alleviate poverty for working parents/families?
 - What is the impact (if any) on parents' and children's wellbeing?
-

Overview of methodology

2.3 A mixed methods approach was adopted for the evaluation, which involved several research strands. The table below presents an overview of the different strands of the research.

Table 2.2. Overview of methodology

Participant	Method	Number of respondents	When
Welsh Government Officials	Telephone and face-to-face interviews	11	Throughout the evaluation period
All EILA Offer team representatives	Face-to-face interviews	1-4 staff in each EILA; 18 interviews	Autumn 2017; Early 2018 and September 2018
Key stakeholder organisations*	Telephone and face-to-face interviews	14	July to September 2018
Participating Childcare providers	Telephone interviews	150	March to September 2018
Participating parents	Online survey	555	May 2018
Participating parents	Telephone interviews	36	August/September 2018
Non-participating parents	Telephone interviews	21	August/September 2018

*Annex D contains the list of stakeholders interviewed.

Interviews with Welsh Government Officials

2.4 A series of interviews were conducted with 11 Welsh Government officials. The initial interviews focused on strategic design of the evaluation, aims and objectives of the Childcare Offer and the key research questions for the evaluation. Further rounds of interviews with Welsh Government officials throughout the evaluation period focused on progress, new developments and lessons learnt.

Interviews with EILA Offer team representatives

2.5 A series of interviews were conducted with Childcare Offer team representatives within each of the seven EILAs. Three rounds of interviews were conducted over

the 12-month period of the evaluation. Round one took place in the Autumn 2017 and focused on understanding how EILAs were implementing the Offer. Round two took place in early 2018 and focus on progress, new developments and changes in delivery. Round three took place in September 2018 and provided EILAs with the opportunity to reflect on the first year of delivery and consider lessons learnt.

Analysis of monitoring data

- 2.6 Monitoring data on families accessing the Childcare Offer is submitted by each EILA to the Welsh Government. Analysis of this data for the early implementation period of the Offer was conducted to examine the number of children accessing the Offer, the profile of families and the hours of childcare booked and used under the Offer.

Interviews with key stakeholders

- 2.7 Key national stakeholders were interviewed during the evaluation. A list is provided in Annex D. These interviews focused on stakeholders' views on the design and implementation of the Childcare Offer and outcomes and impacts of the Offer. Interviews with officials responsible for related Welsh Government-funded programmes, such as Flying Start and the Parents Childcare and Employment (PaCE) programme were also conducted. The focus of these interviews was to explore how the Childcare Offer links to existing provision and programmes.
- 2.8 Some of the stakeholders interviewed expressed views relating to the design of the Childcare Offer in Wales and expressed a concern that the non-working parents and their children will miss out. However, the focus of this evaluation has been on the early implementation process and early impact of the Offer on participating parents and childcare providers and not on the Offer's overall purpose. As such, these views are not included in this report. However, views expressed by these stakeholders relating to the focus of the Offer can be found in the minutes taken

during the Children, Young People and Education Committee meeting in June 2018⁴⁰.

Interviews with childcare providers

2.9 Interviews were conducted with 150 childcare providers registered and delivering the Childcare Offer. Contact details for these providers were supplied by each EILA in February 2018. The providers were contacted in batches (according to EILA), via email, from March to September 2018. Providers that did not reply to the initial email were re-contacted via email or text message two to three weeks after the initial message was sent. Interviews broadly focused on communication of the Offer; design and implementation of the Offer; influence of the Offer on provider delivery and any changes in provision offered; impact of the Offer on the sustainability of providers; and lessons learnt. The topic guide is included in Annex E. A breakdown of the number of providers interviewed per EILA is presented below.

Table 2.3. Number of childcare providers interviewed by EILA

EILA	No. of providers interviewed*	No. of contact details received
Blaenau Gwent	20	57
Caerphilly	21	82
Flintshire	32	68
Gwynedd a Mon	40	104
Rhondda Cynon Taf	18	64
Swansea	18	28

*Column does not total 150 as some providers are registered with more than one EILA.

2.10 The evaluation also aimed to interview childcare providers based within the early implementation areas, that had not registered to be involved in delivering the Childcare Offer. The purpose of these interviews was mainly to explore reasons why these childcare providers had not participated in delivering the Childcare Offer. Each EILA was asked to provide contact information for any non-participating

⁴⁰ For example: Children's Commissioner for Wales, 2018, [Evidence at Children, Young People and Education Committee Meeting on 16/05/2018](#).

childcare providers. However, there appeared to be only a few providers that had not registered to participate in the Offer. Furthermore, most registered providers were delivering the Offer. Consequently, only three non-participating childcare providers were interviewed during the evaluation period. It was initially anticipated that these interviews would provide a qualitative contribution to analysing the counterfactual. However, as there so few non-participating providers these interviews have mainly been used to gather examples of why some childcare providers chose not to take part in the Childcare Offer.

Survey of participating parents

- 2.11 An online survey of parents accessing the Childcare Offer was conducted in May 2018. The purpose of this survey was to gather parents' views on the Childcare Offer, whether it has influenced parental work activity and its perceived impacts on families and children. The survey questionnaire is provided in Annex F.
- 2.12 A pilot phase of the survey took place in February 2018 with a sample of 100 cases from Gwynedd and Anglesey. Gwynedd and Anglesey were chosen as a pilot area as it provided a good opportunity to test the Welsh and English language versions of the survey questionnaire. An invitation letter and email were sent to all 100 cases in the sample and reminder emails and letters were sent at intervals to those who had not yet taken part. The main purpose of the pilot was to test the survey instrument.
- 2.13 The mainstage fieldwork took place from 8th May to 15th June 2018. Using a census approach, all parents taking up the Childcare Offer within each EILA were invited to take part in the survey. A total of 1,275 parents were contacted via email. This sample frame consisted of people who had taken up the Childcare Offer between September 2017, when the early implementation of the Offer was launched, and February 2018.
- 2.14 The survey was completed by 555 parents with a response rate of 43 per cent. Table 2.4 shows the breakdown of survey responses and the response rate as a proportion of the sampling frame by EILA. The proportion of responses by local

authority varied. More than half of the parents who were then taking up the Offer in Gwynedd and Anglesey, and Flintshire participated in the survey compared to just over one in three (36 per cent) in Blaenau Gwent.

Table 2.4. Survey response rates by EILA

EILA	No. of responses	Responses rate as a proportion of sampling frame (%)
Blaenau Gwent	75	36
Caerphilly	109	39
Flintshire	129	52
Gwynedd a Mon	82	57
Rhondda Cynon Taf	82	38
Swansea	78	44
Total	555	43

Interviews with participating parents

2.15 Interviews were conducted with 36 parents who had accessed the Childcare Offer. A stratified random sampling was used to select an initial sample of 96 parents to contact for interview from a list of all parents whom had accessed the Childcare Offer as of February 2018. This sample was stratified according to each of the EILAs, with 16 parents randomly selected from each EILA initially. The number of parents responding from each EILA from this initial sample was monitored and further sampling was conducted to select additional parents from EILAs where the response rate was low. An overall total of 161 parents were contacted for interview, 36 of which responded and were interviewed. These parents were contacted via email in August 2018, with a reminder text message sent a week later. Interviews broadly focused on parents' awareness of the Offer and the information that they had received, views on the application process; how parents had accessed the Offer during term- time and school holidays; difference the Offer had made to parents, both financially and in terms of employability. A breakdown of the number of parents interviewed per EILA is presented below.

Table 2.5. Number of parents interviewed per EILA

EILA	No. of parents interviewed*
Blaenau Gwent	5
Caerphilly	8
Flintshire	7
Gwynedd a Mon	4
Rhondda Cynon Taf	7
Swansea	5

Interviews with non-participating parents

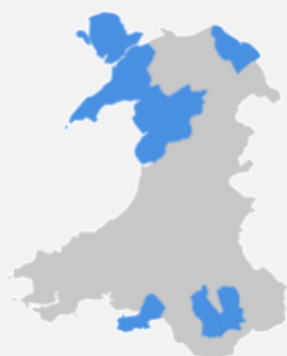
- 2.16 Interviews were conducted with 21 parents whom were eligible for the Childcare Offer but had not accessed it. These interviews focused on parents' reasons for not taking up the Childcare Offer and explored any issues with the application process for those whom had started the process of applying. It was anticipated that these interviews may highlight potential barriers to participation which could inform the future rollout of the programme. The interviews would also provide a qualitative contribution to analysing the counterfactual.
- 2.17 Contact details for non-participating parents were gathered from two different sources:
- EILA Offer teams provided contact details of those parents whom had successfully applied for the Childcare Offer (giving consent to be contacted in the process) but had not accessed it.
 - All childcare providers interviewed were asked whether they knew of any parents who would be eligible for the Childcare Offer but had not accessed it. Childcare providers who were aware of these parents were sent a message to forward to these parents which provided an explanation of the evaluation and invited parents to get in touch with the evaluation team for an interview.
- 2.18 Parents whom had given their permission to be contacted were initially contacted either via email or text message in July 2018 and again two to three weeks later if no reply was received. Non-participating parents who took part in these interviews were offered £20 in high street shopping vouchers as a reimbursement for the time they took to contribute to this study.

3. Implementing the Childcare Offer for Wales

- 3.1 This section summarises how the Childcare Offer for Wales was implemented and provides details on the design and rationale of the Offer and its early implementation at a local level. The engagement of childcare providers and parents during the initial implementation is also discussed.

Implementing the Childcare Offer - Key findings

EILA Offer teams



7 local authorities
September 2017 to August 2018



Effective communication and **close working** between EILA Offer teams and Welsh Government were key to overcome early challenges

All

EILA Offer teams reported the **time** and **resources** needed to deliver was greater than expected



Map created in Piktochart

Child providers and parents

94%

Of childcare providers **actively promoted** the Offer to parents



92%

Of parents reported the **application process** was straightforward



Submitting evidence of employment was a challenge particularly for parents **self-employed** or on **zero-hour contracts**, or working **irregular flexible hours**



Other key findings

EILA Offer teams

- EILA Offer teams encountered challenges when engaging childcare providers during the early stages due to **information gaps** (e.g. hourly rate);
- EILA Offer teams were typically one full-time, and one or two part-time staff;
- Some EILA Offer teams '**borrowed**' **staff from other departments** during peak

- demand on EILA Offer team time, particularly during application times;
- Previous childcare/education-related roles of EILA team members **positively influenced engagement** with childcare providers.

Engaging with childcare providers

- Childcare providers welcomed **direct contact with the EILA Offer team**, this was effective in raising awareness of the Offer;
- The majority of childcare providers reported that **signing up for the Offer was straightforward**;
- The general view of childcare providers was that the process for submitting information for payment was fine, although slightly time-consuming;
- **Differing amounts of FPN** within, and across EILAs, affected the number of Offer hours available for each child.

Engaging with parents

- EILAs awareness-raising activities were **focused within the identified pilot areas**;
- Ensuring **accuracy of information was critical** as 'word of mouth' was key for providers when communicating the Offer to parents;
- **Maintained school settings** delivering FPN were not as involved in the early implementation process and as a result were less involved in raising awareness of the Offer among parents;
- EILAs estimated 40-60 per cent of initial applications had **missing or out of date eligibility evidence**;
- Some EILA Offer teams **invested considerable time** supporting parents to provide eligibility evidence.

Design and rationale

- 3.2 The economic and social benefits associated with the availability of, and access to, quality childcare is widely recognised. Access to childcare is a key requirement in enabling parents to continue in or return to work. It can also be a factor in reducing child poverty and in supporting the educational, social and emotional development of children. The childcare sector also supports a number of independent businesses and provides employment opportunities.
- 3.3 In recognition of these benefits, commitments to introduce a Childcare Offer in Wales were included in the manifesto of most of the political parties in Wales leading up to the 2016 Assembly election. Plans for a Childcare Offer were introduced soon after and set out in the programme for government. The primary aim of the Offer is summarised in the logic model presented in Annex B.
- 3.4 Under the Childcare Offer, eligible parents can receive a combined total of 30 hours of early education and childcare during term time. The current early education entitlement provided by the Foundation Phase (FPN) forms part of this Offer. For up

to 9 weeks of the year, outside of term time, parents will receive 30 hours per week of childcare.

Process of engaging with EILAs

- 3.5 During the second half of 2016, an invitation was sent out to all 22 local authorities in Wales asking them to submit expressions of interest to pilot delivery the Childcare Offer in their areas. Sixteen of the 22 local authorities responded to this invitation by submitting 13 expressions of interest (EOI) identifying the potential need for the Offer and an outline proposal as to how the Offer would be delivered in their area. The EOIs were submitted to Welsh Government in various formats which made drawing comparisons between them challenging. Five EOIs were approved and these became the early implementer local authorities (EILAs). These were a joint submission from Gwynedd and Anglesey, Flintshire, Blaenau Gwent, Rhondda Cynon Taf and Swansea. A sixth, Caerphilly, joined at a later stage (February 2017).
- 3.6 The selected EILAs were required to ensure that they would be able to receive applications from eligible parents by August 2017 to enable parents to access the Childcare Offer at participating childcare providers from September 2017 onwards. To achieve this, EILAs were required to:
- Draw together a team of local authority staff to oversee, manage and coordinate local delivery of the Offer.
 - Choose areas/wards within their local authority area within which to pilot the Offer.
 - Raise awareness of the Offer among childcare providers and eligible parents.
 - Introduce new or utilise existing systems to enable the EILAs to:
 - Receive, review, approve and process applications for the Offer from parents.
 - Enable childcare providers to register to deliver the Offer.

- Receive and record information from each provider relating to the number of Childcare Offer supported hours booked and accessed by each eligible child in their care.
- Process regular payments to providers.
- Collect and record monitoring data and report this back to Welsh Government.

- 3.7 Many Welsh Government and EILA Offer teams consulted noted that initially they considered achieving all these requirements within the timescale available to be unmanageable, particularly given that some key policy details relating to the Offer, including the overall budget available and the hourly rate that would be paid to childcare providers, were not agreed and finalised until the middle of 2017. These information gaps created some challenges for EILAs in their efforts to encourage childcare providers to register to deliver childcare through the Offer.
- 3.8 These challenges were successfully addressed, and each of the seven EILAs were able to receive applications from parents by August 2017. Those consulted were of the view that the communication and close working relationship that was developed between Welsh Government and EILAs during 2017 had been key to achieving this. EILA Offer teams noted that they welcomed the way Welsh Government involved them in the process even before the policy had been signed off. While this level of involvement may have been a necessity given the challenging timescales involved, it nevertheless resulted in EILAs taking a greater ownership of the Childcare Offer delivery process, which in turn ensured that nearly all of the challenges referred to above were successfully overcome.
- 3.9 One EILA noted that they welcomed the fact the Childcare Offer was not 'placed upon' them by Welsh Government in a 'prescriptive way' and that the challenging timescales involved encouraged more open working relationships, which in turn ensured that much more was achieved than may otherwise have been the case.
- 3.10 It should also be noted, however, that the success of the early establishment of the EILAs and the local delivery systems developed, cannot be attributed solely to the engagement and communication processes developed between Welsh Government and participating local authorities during this time. Much of the success was driven by the enthusiasm and determination of the individuals involved in the EILA Offer

teams. Nevertheless, this enthusiasm at local and national level, alongside the open and transparent communication and engagement processes were mutually supporting factors that led to the early implementation success. The challenge now will be to instigate similar enthusiasm and openness during the further roll-out of the Offer across Wales.

Implementation on a local level

The operating structures of EILAs

- 3.11 The seven participating EILAs typically operate as a core team of one full-time member of staff and one or two part-time staff employed by the local authority. The teams usually comprise of one manager, one coordinator and administration support. Each EILA receives an administration grant which assists with the costs of delivering the Offer ahead of national administration systems and processes that will put in place in due course. The administration grant is mainly used to support EILAs to engage with parents and childcare providers in order to raise their awareness of the Offer as well as support systems to process applications for funding support, provider registrations and support parent applications.
- 3.12 Within some EILA Offer teams, the staffing costs of the team are completely funded by the administration grant. In others, the costs are partly funded by the grant and partly funded from local authority core funds. The demand on resources to administer the Offer on a local level often goes through peaks and troughs; typically, applications for the Offer are highest at the start of school terms which creates a spike in the demand for resources.
- 3.13 EILAs appear to manage these peaks and troughs in administration demand by applying some fluidity into the way they allocate the time of personnel and other resources available. During peak administration demand times, EILAs noted that they often 'borrowed' the time of other staff members across the local authority. In return, some of the EILA Offer team members, whose time is funded by the administration grant available through the Offer, provide some of their time and

support to undertake other tasks within their department during periods when the Childcare Offer administration demand is lower.

- 3.14 The ability of EILA Offer teams to operate in this way varies across local authority areas. Some local authorities require all the time and resource costs associated with administering the Offer to be covered by the grant provided. Other local authorities have a slightly more flexible approach to sharing resources across departments. However, all EILAs noted that the amount of administration time and resources required to deliver the Offer on a local level has been greater than initially anticipated. This, in the opinion of EILAs, has been due to the unexpectedly high level of resources required to respond to and resolve the various challenges associated with supporting parents to provide the eligibility evidence (see also section 3.34).
- 3.15 EILA Offer teams are located in various departments within the operational structure of the local authority where they are employed. Some teams are located in their authority's education department, and others in early years and family support services. The ability of EILAs to support the local delivery of the Offer is largely dependent on the extent to which they can support and influence external communication and awareness-raising with providers, parents and wider stakeholders, as well as their ability to access information and wider support internally within the local authority. The location of the EILA Offer team within its local authority staffing structure to some extent determines the internal and external reach and connectivity of the EILA.
- 3.16 The ability of the EILA to successfully administer the Offer is also influenced by the experience gained by individual team members in their previous roles and their existing contacts. EILA Offer teams that include individuals who had previously established good working links with their local childcare sector, for example, appear to have used these links to successfully gain the support from childcare providers in terms of delivering the Offer as well as promoting it to parents. On the other hand, team members who had established good working links with education providers may have found engaging with childcare settings more challenging. Their strength lies in the contacts they have developed with local primary schools that deliver FPN

and school admissions teams within the authority. The nature of the reach and influence of local administration teams should therefore be taken into consideration when planning the rollout of the Offer across other local authorities in Wales during the next year or two.

Selecting the early implementer local areas

- 3.17 The early implementation of the Offer was targeted towards specific wards and areas within each EILA with the aim of rolling the Offer out across wider areas within each of these local authorities at a later stage. The exception to this was Blaenau Gwent, where the Offer was rolled out local authority-wide. The rationale for the staged rollout across the other six EILAs was to ensure that the administrative burden associated with local implementation remained at a manageable level. It also provided an opportunity to test the early implementation of the Offer in areas with different socio-economic characteristics.
- 3.18 EILAs were therefore tasked with choosing the areas within their local authority where they wanted to pilot the Offer. Five of the six EILAs chose individual wards, within their local authority, within which to test the early implementation of the Offer. The rationale of their choices was based on factors such as population density (to including some urban and rural areas) as well as the current level of childcare provision and employment in those areas. The areas selected by each local authority to roll out early implementation of the Offer are listed in Annex C.
- 3.19 The other EILA chose local pilot areas on the basis of school catchment areas. This approach encountered some challenges as some of the faith and Welsh-medium schools had relatively wide catchment areas and parts of these catchment areas overlapped those of selected schools. If the EILA chose not to include the catchment areas of Welsh-medium and faith schools in the pilot, then this would result in some families being excluded from the Offer even though other families living in the same ward as them would be included. As a result, the EILA's approach to choosing pilot areas could have been perceived as discriminatory against faith and Welsh-medium schools. To address this issue, the EILA changed to the use of electoral wards in January 2018, to bring it into line with other EILAs. This

adjustment resolved many of the issues associated with using school catchment areas, but the process of adjusting did result in some delivery delays.

- 3.20 EILAs were also asked to identify some additional, 'contingency' local wards or areas where the early implementation of the Offer could be expanded into if required. Some EILAs did this early and gained the approval of their council cabinet in the process. Others identified some contingency areas but did not confirm these with their cabinet at that stage, so when the opportunity came to expand the Offer into new areas, not all the EILAs were ready to do so which resulted in some further implementation delays.
- 3.21 Some of the stakeholders interviewed were of the view that this gradual implementation of the Offer across pilot areas within EILAs may have erred slightly too far on the side of caution. In their view, given how well initial processes were developed and implemented and given that the numbers accessing the Offer were lower than initially expected, plans for full local authority rollout could have been implemented earlier across the EILAs. This would have avoided some of the challenges noted above relating to choosing initial early implementer areas and would have made it easier to engage with potentially eligible parents.

Engaging with childcare providers

- 3.22 Almost all providers interviewed as part of this evaluation noted that they had initially become aware of the Childcare Offer through direct contact with their local EILAs Offer team. This initial engagement was effective in raising local providers' awareness of the Offer and encouraging their participation in delivering the funded childcare. Activities relating to this early engagement usually involved a series of meetings to which local providers were invited. These meetings provided an opportunity for EILAs to present the Offer to local providers and encourage them to register as Childcare Offer providers. Most providers interviewed noted that they welcomed these early meetings, even though at the time some important details, including the hourly rate that the Offer would pay providers, had not yet been confirmed.

- 3.23 Although the location where participating children and parents lived formed part of their eligibility criteria, there were no geographical limitations as to where the Offer could be taken up. As such providers located anywhere within, or outside the local authority area could provide childcare funded by the Offer to eligible children. However, initial provider awareness-raising activities primarily targeted providers located within the EILA boundary. As a result, some providers located outside the EILA areas noted that they only became aware of the Offer when parents approached them at a later date.
- 3.24 The only eligibility criteria childcare providers are required to meet in order to deliver childcare supported by the Offer is that they are registered with Care Inspectorate Wales (CIW). Beyond this, providers needed to register with the EILA in order to receive payments and agree the terms and conditions of the Offer. In many cases, providers signed up to deliver the Offer during the open meetings they attended.
- 3.25 One EILA developed a childcare provision toolkit which outlined quality standards that they expected childcare providers to reach. As part of the registration process providers in this area were required to sign up to demonstrate that they met these standards by signing up to the toolkit. The Welsh Government decided that additional or alternative quality standards, in addition to those imposed by CIW for registration should not be introduced as a registration pre-requisite and could deter some providers from supporting the Offer.
- 3.26 The majority of providers interviewed described the sign-up process to deliver the Offer as 'straightforward' (see section 3.40). Most providers also noted that the EILA Offer team had maintained a good level of regular contact with them throughout the early implementation process.
- 'They [the EILA Offer team] are always on the end of the phone if we need anything'. (childcare provider).
- 3.27 Some of the providers interviewed relayed examples of how members of the local EILA Offer team had visited their setting, often outside normal office hours, to provide further information or one-to-one guidance to help to complete the monthly data returns.

- 3.28 Each childcare provider is required to submit information to their EILA at the start of each month outlining the number of hours of childcare booked through the Offer. Payment is then made based on these number of hours booked. Providers are also required to report back at the end of each month how many of the hours booked were used. The general view, as expressed by most of the childcare providers interviewed, was that this process was fine albeit slightly time-consuming. However, a few noted that in their view the administrative burden was quite heavy. This appeared to especially be the view among providers that did not have easy access to the internet and/or those, who by their own admission, were not very computer literate. Many providers, especially childminders, explained that they prepared these returns in the evening outside normal working hours. Some also noted a couple of administration system glitches, especially at the very early implementation stage which resulted in some late payments. In most cases, these early teething problems were quickly resolved. More recently, however, some administration challenges have resurfaced in relation to booking hours of childcare during school holidays. This is expanded upon further in the separate Holiday paper published alongside this full report.
- 3.29 Three of the providers interviewed delivered Childcare Offer places for children from more than one EILA. These providers were therefore required to submit separate monthly monitoring sheets relating to the child(ren) that lived in each EILA. These providers did not consider this to be a considerable issue but did note that slight differences between the process for each EILA did cause some confusion.
- 3.30 Differing amounts of FPN provision across EILAs also created some administration challenges for the EILAs and providers as this affected the number of hours of Childcare Offer hours available to each child. For example, settings in one EILA might offer 12 hours of FPN a week, in which case a child eligible for the Childcare Offer could access 18 hours of funded childcare; while settings in another EILA might offer 10 hours of FPN allowing for 20 hours of funded childcare. Children from these two EILAs attending the same childcare setting will be entitled to different amounts of funded childcare, and the provider must take this into account when submitting monitoring forms and claiming payments. The administration of the Offer also has to take account of the different number of FPN hours according to the age

of a child – FPN hours offered to children at age three may increase when they turn four. Where there are increases, these occur at different points across the EILAs, for example, some increase from the term after the child's fourth birthday, others from the September after the child has turned four.

- 3.31 Differing levels of FPN provision does not only occur across EILA boundaries. In some cases, settings within the same local authority offer different amounts of FPN, even the same setting can sometimes offer differing hours of FPN depending on whether the child attends a two and half hour FPN session each morning or a two-hour FPN session each afternoon. Different schools may also choose to provide additional hours of FPN themselves.

Engaging with parents

- 3.32 Promoting and raising awareness of the Childcare Offer to eligible parents during the first year of the early implementation, has been largely successful although some challenges have also been encountered. Where specific wards were chosen, only working parents living in these wards could be eligible for the Offer during the first year. It followed therefore that working parents of three and four-year-old children who lived within the same local authority area but just outside the postcode of the selected wards would not be eligible. As such, adopting a centralised Wales-wide or even a local authority-wide promotional campaign to encourage parents to use the Offer was not considered to be appropriate. Instead, a more targeted approach was taken with most of the awareness-raising activities supported by EILAs being focused within the identified early implementer t areas.
- 3.33 Various promotional activities have been put into place. However, most of the parent awareness-raising activities to date have been undertaken by childcare providers. The vast majority of providers interviewed (94 per cent) reported that they had actively promoted the Offer to parents in various ways including social media, posters, newsletters and flyers.
- 3.34 The main challenge in promoting the Offer to parents, via the childcare providers, has been ensuring that the information passed on is correct and consistent;

especially given the reliance placed on word of mouth as a communication channel. Providers outlined that some parents were confused about the Offer's eligibility criteria and others were confused by the term '30 hours' as it led some to believe they were entitled to 30 hours of government funded childcare regardless of their entitlement of FPN. In these situations, providers often referred the enquiry on to the EILA Offer team or directed the parent towards the Childcare Offer page on the local authority website.

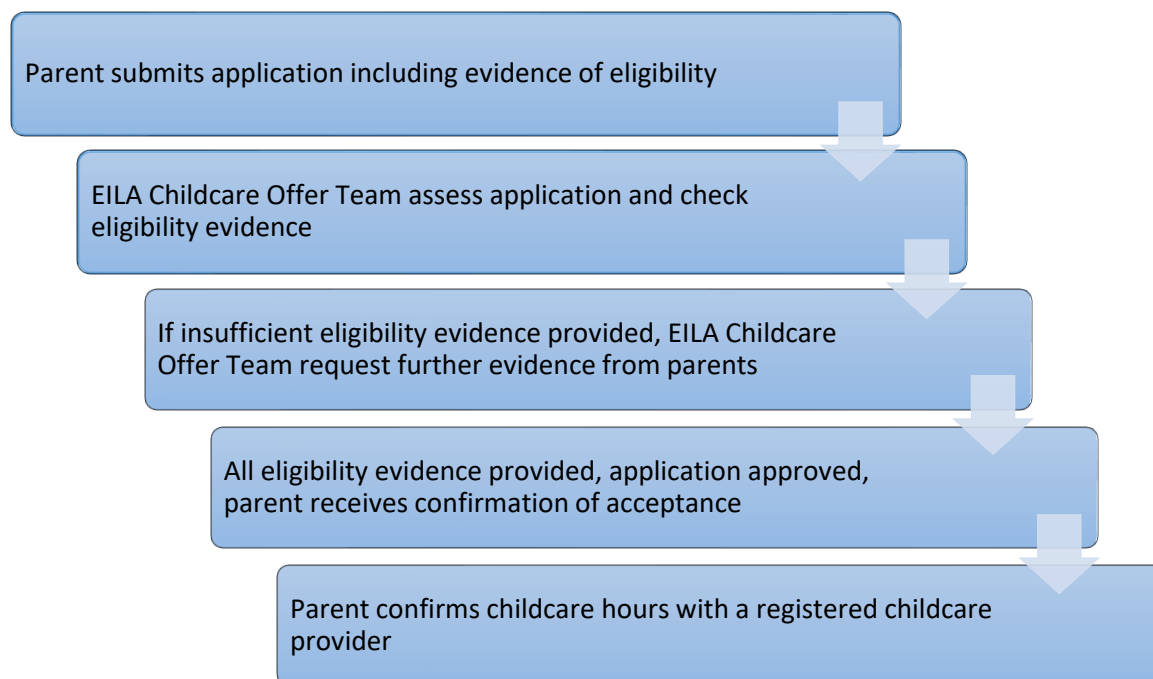
- 3.35 Generally, the promotional and awareness activities undertaken by providers were largely effective. However, they were limited in their ability to reach all potentially eligible parents, especially those who did not currently access formal childcare or who accessed childcare from a provider that had not registered to deliver the Offer. This may partially explain the lower than expected number of parents accessing the Offer during the first year of early implementation.
- 3.36 Schools were not involved in the initial engagement processes supported by the EILAs. EILAs reported that most of their attention in the early implementation period had focused on childcare providers operating in non-maintained settings as it was these settings that would be the recipients of the funding and therefore needed to register as Childcare Offer providers. It naturally followed therefore that these providers were more aware of what the Offer entailed and therefore served as the main gateway for parents to access the Offer. As a result, maintained school settings that deliver FPN to three- and four-year-olds were far less involved in the process of raising awareness of the Offer among parents. This may not be surprising given that they are not direct recipients of any Childcare Offer funding. However, the FPN hours they deliver each week form a key component of the overall 30-hour Offer. This suggests that more support could possibly have been required to encourage schools to take on a more active role in promoting the Offer.
- 3.37 Some EILA Offer teams noted that they had approached some school settings to raise their awareness of and possible support for the Offer. Some examples were offered by childcare providers where they had been invited to attend parents' FPN enrolment meetings at a local school where they had an opportunity to introduce parents to the Offer and their childcare services. However, examples such as these

were very much in the minority. More typically it was reported by EILAs that head teachers in local school settings and their education department were not actively involved in the early implementation process. Some EILA Offer teams and wider stakeholders were of the view that most education departments and settings consider their role to be distinctly separate from childcare activities. As such, although examples of partnership working between education and childcare providers do exist, they are relatively rare. As the Childcare Offer consists of both childcare and FPN, this lack of alignment between the two may place some limitations on the extent to which parents can access both strands of the Offer. However, it should be noted that interviews with schools did not form part of this evaluation process, which places some limitations on the findings reported above. The alignment between the FPN and childcare strands is discussed in more detail in the separate Foundation Phase Nursery Provision paper.

Application process

- 3.38 Parents who are eligible to receive the Childcare Offer are required to apply for the funding support through their EILA. The typical application process involved is outlined in figure 3.1. Some EILAs provide an initial online eligibility check, using child's date of birth, parent's postcode and working hours.
- 3.39 As part of the application process, parents must provide evidence of their eligibility, including proof of address, birth certificate of the child and evidence of employment (usually three months of payslips). Parents can submit this evidence electronically in some EILAs while in others paper copies of the evidence are required. In some EILAs the funding for childcare starts once the place is confirmed by the EILA, whereas in other areas the funding begins once the request has been agreed by the childcare provider and approved by the EILA.

Figure 3.1. The parent application process for the Childcare Offer in Wales



- 3.40 The majority (92 per cent) of parents who responded to the survey noted that they felt that the application process was straightforward. However, EILAs noted a number of challenges which they had encountered and often had to resolve while approving and processing applications. These included applications that did not include all the evidence required and, in these cases, members of the EILA Offer team requested further information from parents. EILAs estimated that some 40 – 60 per cent have some missing or out-of-date evidence. Although parents were asked to provide copies if submitting by post, some submitted original documents which needed to be stored and returned to the parents once the application was verified.
- 3.41 The main challenge faced by EILA Offer teams, in approving and processing applications for the Offer, was gathering from parents, proof of their employment eligibility – i.e. proof that they earned the equivalent of 16 hours' national minimum wage or national living wage or more each week. The evidence requested to prove this was usually payslips for the last three months of employment. Parents employed in stable jobs could produce this evidence relatively quickly. Others, however, struggled to provide proof, especially if they were employed on a zero-

hour contract basis, were self-employed or worked irregular flexible hours from week to week. These parents are often those in lower paid work and therefore, arguably, the most likely to benefit from the Childcare Offer support. This is particularly the case for either single parent households or for two parent households where both parents are in lower paid work. If these are also parents who find it most challenging to prove their employment status eligibility, then this could place some limitation on the extent to which the Offer can achieve its aim of tackling poverty.

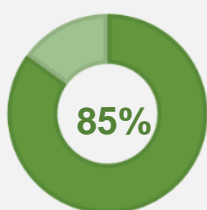
- 3.42 All EILA Offer teams interviewed were aware of this potential challenge and noted that their approach to processing applications was to enable and support parents as much as they could to access the Offer. This often entailed investing considerable amounts of time and effort to support parents who struggled to demonstrate their employment eligibility to produce the evidence they needed. The support required has included EILA Offer teams making many 'phone calls to parents as well as directly contacting employers and accountants in order to gather the employment and earnings information required.
- 3.43 One self-employed parent interviewed noted that they had decided not to use the Offer, even though they were eligible, because the process of providing evidence of employment and income was too onerous. Some childcare providers also provided similar anecdotal accounts of parents who had been 'put off' applying because they could not prove their employment eligibility. However, it should be noted that only a minority of those interviewed outlined referred to these issues and as such further research is required into understanding the barriers to accessing the Offer faced by parents before any firm conclusions can be drawn. As such, the findings presented in this paragraph should be treated with caution at this stage.

4. The Offer's influence on providers

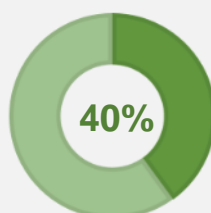
- 4.1 The evaluation sought to explore how accessible and easy it was for providers to deliver childcare supported by the Offer, including its commercial viability, and whether there was sufficient childcare capacity to deliver the Offer. The findings in this section are mainly based on 150 qualitative telephone interviews with childcare providers who deliver funded childcare.

The Offer's influence on providers - Key findings

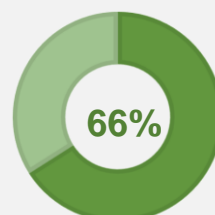
Childcare providers



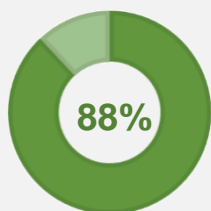
Heard about the Offer from their **local authority**



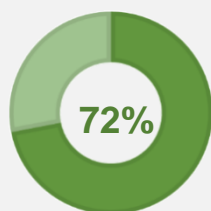
Reported an **increase** in the number of children since the previous year



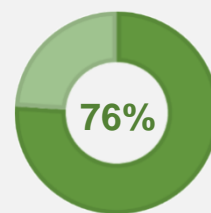
Reported having capacity to expand should demand increase



Agreed **£4.50** an hour is commercially viable



Reported improved **profitability**




Reported improved **sustainability**

Also

25% 

Accessed business support following the introduction of the Offer

15% 
Introduced **additional charges** for food and transport

£

Relatively low use of the **SEN budget**

No marked change in provision of childcare during **school holidays** 

Other key findings

Providers implementing the Offer

- The majority of childcare providers reported that **submitting the returns ‘simple and quick’**, once initial technical issues had been resolved;
- **Initial reservations** childcare providers had about the rate, timings of payments and onerous administration **proved unfounded**.

Change in demand

- The Offer had totally or partly influenced the reported **increase in demand** for places according to 80 per cent of providers who reported increasing numbers.
- There was **no evidence** of a surge in enquiries for childcare which some providers had anticipated;
- Some (10 out of 36) **sessional day care providers** interviewed had **extended opening hours**, with a few now open during the school holidays too;
- Fewer (3 out of 47) **full day nurseries** reported extending their opening hours;
- Although there is no evidence of providers substituting **FPN** for the Offer, a small number (six) **may consider changes in future**.

Commercial viability of the Offer

- Some stakeholders commented on the importance of ensuring **the hourly rate is reviewed**, rises in line with inflation and takes account of sector-specific cost increases.
- The higher hourly rate received for the Offer, and existing children increasing their hours contributed to **improved sustainability** for providers.
- Childcare providers reported the importance of maintaining a balance of children's ages so that there was a sustainable flow of children, and as a such they were **keen to continue accepting younger children** at their setting.
- The minimum **staff ratios** for childcare influences commercial viability and can influence the ability and willingness of providers to take on additional children.
- **Payments** from EILAs are received in a **timely and accurate manner** according to 94 per cent of childcare providers interviewed.
- Childcare sector representative organisations provided **the main source of support** for childcare providers. The nature of such support focused on training as opposed to business planning.

Delivery costs and charging structures

- The **delivery cost per child had not changed** as a result of the Offer according to most (90 per cent) childcare providers interviewed.
- Childcare providers attributed any increase in delivery costs to **additional administration tasks**.
- Many childcare providers set **fees based on half- or full- day rates** and relating the £4.50 hourly charge to this was a challenge for some.
- Childcare providers adopted **different approaches** when allocating the Offer hours and charging parents for additional hours used.

Special Educational Needs (SEN) provision

- **A range of support** including one-to-one, specialist advice, training and ‘backfilling’ to facilitate staff training sessions for childcare providers have been funded using the **SEN budget**.

Welsh language provision

- There is no evidence of a movement away from **Welsh-medium childcare**;
- Welsh-medium childcare is **accessed by 37 per cent of parents**, with the vast majority of these in Gwynedd and Anglesey;
- The 15 cylchoedd interviewed were more likely than other providers to **report positively on profitability and sustainability** and all 15 reported that £4.50 an hour was viable;
- None of the cylchoedd interviewed had introduced extra charges since delivering the Offer;
- **Capacity to expand** was mixed for cylchoedd – some reported vacancies while others reported waiting lists.

4.2 A large majority (85 per cent of the providers interviewed) had heard about the Offer from their local authority and most reported that the information that they had received about the Offer was clear and at the right level of detail. Signing up for the Offer involved signing the EILA's provider agreement form and the majority of providers described signing up to take part in the Offer as straightforward. Once a funded child starts at the setting the administration requirement from then on relates to the reporting of booked and used childcare hours. Submitting the returns online was 'tricky at first' for some providers, especially childminders, but on the whole all providers found the process of submitting returns 'simple and quick', once a few technical issues had been resolved. The whole process was 'much easier than other programmes we're funded to deliver such as Flying Start', according to one provider.

4.3 The EILAs' provider meetings laid the basis for a positive working relationship between the providers and the EILAs and with very few exceptions, the providers praised the support from the EILAs (see section 3.22 -3.27). Initial reservation about the rate, timings of payments and onerous administration proved unfounded. The Offer appealed to the majority of providers, and many referred to being glad of the financial help available to their customers. Some explained that they went along with providing the Offer as they realised that others in their area would be offering it.

'We realised, looking through our registers, that there was quite a lot of 3 to 4-year-olds... and we realised that a lot of those parents would be eligible for this Childcare Offer and if we didn't offer it, they are going to go elsewhere that do offer it. So, it was a no-brainer. It was something that we felt we had to offer our

parents. And not just that, if they are entitled to help... then they should be able to access it, without unsettling the children having to move them to a new.' (Large full day care provider, covering two EILAs).

- 4.4 Table 4.1 provides an overview of some of the key influences on the different types of childcare providers, which will be expanded on in this section.

Change in demand

- 4.5 Providers were asked whether the number of children they had at their setting had changed compared to the previous year, and for just over half (85 of the 150 interviewed) it had stayed the same while five had seen a decrease due to there being fewer children in the area this year. 40 per cent providers (60 of the 150 interviewed) had seen an increase in the number of children at their setting. Most of the providers (48 of the 60) explained that this was totally or partly influenced by the Offer. In the main, this was due to existing parents using more childcare, but there were also examples of parents opting to keep their child at the childcare provider for an additional year where otherwise they would have used informal care as wraparound for the FPN. The evaluation findings suggest therefore that the demand has not increased dramatically and the number of children taking up childcare at most settings has remained fairly constant – possibly reflecting the fact that the Offer has not yet changed behaviours or attitudes towards childcare. Some providers told the evaluators that they had anticipated a surge in enquiries, but that there was no evidence of this.

Table 4.1. Summary of influences on childcare providers

Overview	Childminders (62 interviewed)	Day nurseries (47 interviewed)	Sessional day care (playgroups & Cylchoedd) (36 interviewed)
Number of children	Small number of children with between 1-7 funded by the Offer, with typically one or two funded.	Large number of children with usually a large number funded. The number funded ranged between 1-34.	Medium to large number of children. The number of places funded ranged between 1-26, with most having 3-7 funded places.
Awareness of childcare payment systems	Less familiar with payment systems such as childcare vouchers and tax credits.	Familiar with a range of payment types.	Less familiar with a range of payment types
Record keeping, bills and payment	Paper-based or simple systems used for record keeping, handling bills and payments. Some lack confidence using computers, which affects ease of submitting returns.	Typically used sophisticated systems for record keeping, handling bills and payments	Most have basic systems for record keeping, handling bills and payments, some with sophisticated systems
Parents	Long-standing / tried and tested contractual agreements with parents, usually for 50-52 weeks of the year.	Long-standing / tried and tested contractual agreements with parents, usually for 50-52 weeks of the year.	Only open during the term time, typically for a morning or afternoon session of two or three hours.
Charges	Typically charge per half or full day (some charge hourly) Charges range - £3.25-£5.00/hour (median £4.00/ hour) (56/62 childminders - £4.50/hour is viable)	Typically charge per half day or full day. Charges range - £3.00-£7.50/hour (median £5.00/hour) (32/47 full day care providers - £4.50 is viable)	Typically charge for a two- or three-hour session. Charges range - £2.50-£5.00/hour (median £3.50) (35/36 sessional day care providers - £4.50 is viable)

Source: Childcare provider interviews (n=150)

Note: Two additional childcare providers reported they were out of school childcare providers (one cared for two children, the other six under the Offer). Three other childcare providers reported delivering a combination of full, sessional and after-school care, or were representing several different types of settings.

4.6 Most parents accessing the Offer (94 per cent of survey respondents) were ones who already used formal childcare. Providers interviewed confirmed this and noted

that the majority of the funded children had started at their setting before September 2017.

- 4.7 Providers did not report general capacity challenges in the interviews. A small number of providers explained that they had turned away parents specifically for wraparound or after-school care as these were 'pinch-points' in capacity where they would not be able to employ the extra staff needed for the one hour of care.
- 4.8 Providers were asked whether they had the capacity to expand should there be increase in demand and roughly two-thirds reported that they had capacity. While many explained that they had vacancies or could expand in theory a significant minority reported that they wouldn't want to take on more children. Reasons given for this were mainly based around a reluctance or perceived inability to take on the additional staff that would be required to look after more children as well as concerns that expanding provision could negatively impact on the current mood or 'character' of their setting.
- 4.9 These replies should be taken in the context of the overall difficulties in estimating provider capacity. EILAs noted that estimating vacancies is difficult as the situation can change rapidly and as such providers cannot always report vacancies accurately, nor do they record vacancies in the same way. Childcare Sufficiency Assessments and ongoing monitoring of capacity are only a best estimate.
- 4.10 Providers were asked whether they had changed their delivery models during the early implementation year, and the vast majority had made no changes to fee structures or hours. Many different business models exist in the childcare sector. Even within one part of the sector, such as day nurseries, there are many different fee structures and contractual arrangements with parents in place. This variety long predates the Offer.
- 4.11 **Childminders** set their own terms and conditions. All those interviewed tended to have long-established businesses, said that their provision had remained unchanged as a result of the Offer, and that they had no changes planned. Although none of the childminders interviewed reported a change in hours, 8 of the 62 (13 per cent) reported an increase in the number of children they had and that this increase was totally or partly influenced by the Offer.

4.12 The **sessional day care** providers interviewed were a less homogenous group. Of the 36 interviewed, ten had extended their opening hours and a further two were planning to do so; with the additional hours usually later in the day. Two reported that they opened in the school holidays for the first time and another three were planning to do so. Mudiad Meithrin, who represent the Cylchoedd reported that they had encouraged their Cylchoedd to consider opening for longer and during the school holidays and were starting to see a movement towards this. All of these providers had promoted the Offer to their parents. Almost half (16 of the 36) had seen an increase in child numbers, although the same proportion had seen no change in numbers and four sessional groups saw numbers decrease. Several of the providers believed that the increase in the number of children was due to parents who would have otherwise stopped using the playgroup when their child turned three staying on because of the Offer:

‘Usually children leave our setting once they reach school nursery age - so if it wasn't for the Offer these children wouldn't be taking up any additional hours with us; but our limitation is our ability to provide transport to transfer children from the school nursery to here. Some primary schools have phoned us to see if we can transport some children from there to our setting - but we can't.’ (cylch meithrin/sessional day care)

Some providers reported that they had received more enquiries but were unable to take on more children.

4.13 All of the **full day nurseries** had promoted the Offer to their parents, mainly through posters, social media, emails to existing customers and own website, but by the fieldwork stage (spring and summer 2018) reported that word of mouth between parents was the best promotion. More than half (28 of the 47) had seen an increase in the number of children compared to the previous year, which was totally or partly influenced by the Offer, usually due to existing customers requesting additional hours. Three (of the 47) had extended their opening hours, one opening earlier and two opening longer in the holidays since the Offer. Some providers reported that they had received more enquiries but were unable to take on more children.

- 4.14 The evaluation findings suggest that the operating practices of most full day nurseries has not changed that much as a result of the Offer, although there are examples of the Offer encouraging some individual settings to review of their delivery structures.
- 4.15 The Offer has been designed to be sufficiently flexible to enable eligible parents, who work irregular hours (for example night shifts) to fund up to 20 hours of childcare on a weekly basis around these work patterns. The likely challenge for these parents however, may be accessing formal childcare that can accommodate these hours. However, a small number of providers interviewed noted that in their view the Offer doesn't always provide sufficient flexibility to fund the childcare needs of parents whose working patterns differ from week to week. To illustrate this, they referred to an example of a bank nurse who may be eligible for 20 hours a week of the childcare strand of the Offer (80 hours a school-term-month) who works shifts of 10 days on and four days off. As a result, this parent may require 30 hours of childcare one week but only 10 the next. As a result, this parent would not be able to fund all their childcare needs through the Offer one week but would be eligible for more funded childcare than they require the next.
- 4.16 Interviews with providers sought to find out whether the Offer had influenced their delivery of FPN. No evidence emerged during the childcare provider interviews of providers substituting FPN places for Offer places. However, six childcare providers interviewed reported that they may consider changing their mix of provision in the future. One EILA Offer team reported that five or six non-maintained settings had decided it was better for them to only deliver the childcare element of the Offer as opposed to a combination of FPN and childcare, and another EILA Offer team commented that some providers were struggling and had threatened to drop their FPN provision. See section 6.22 for further explanation. In these individual cases the Offer team successfully appealed to the childcare provider's 'community purpose' and the provider continues to offer FPN for now. This was supported by Mudiad Meithrin's observation that some of their Cylchoedd were considering withdrawing from FPN but had been persuaded against doing so to date. This topic is explored further in the Foundation Phase paper which accompanies this main report.

- 4.17 The childcare providers interviewed varied in the provision that they offered during school holidays and overall, the evidence shows that there has been no marked change in how providers deliver holiday provision since the Offer was introduced. A small number of providers interviewed (four) that were open term time only before the Offer extended their provision by opening in school holidays. This topic is explored further in the holiday provision paper which accompanies this main report.

Commercial viability of the Offer

- 4.18 The childcare sector is recognised as an important contributor to economic and social development in Wales as well as an enabler for parents of young children to return to work or continue in their current employment. A review of the childcare sector in Wales, produced in 2018 by Alma Economics, outlines that approximately a quarter of surveyed childcare providers noted that they expected to operate at a loss during 2016-2017. This was also consistent with data relating to the previous two financial years. Stakeholders interviewed during this evaluation also voiced some concerns relating to the future sustainability of some childcare providers and the potential impact this could have on the choice and availability of childcare provision in the future.
- 4.19 Given the importance of the sector in Wales and the sustainability challenges faced by some areas of it, the Welsh government took this, alongside the employability support needs of parents, into consideration in the design and development of the Offer. It was recognised that there was a need to set a Childcare Offer fee rate that offered sufficient commercial viability to the providers delivering the support, as well as good value for money for the public purse. Setting a rate that was too low would result in childcare providers being unwilling or commercially unable to deliver childcare supported by the Offer. On the other hand, setting a rate that was too high could displace provision away from under threes' and older children towards those supported by the Offer. This, in turn, could lead to higher childcare rates across all settings making childcare less affordable to many parents.
- 4.20 Lessons from the implementation of the Childcare Offer in England were also emerging at the design and development stage in Wales. Some of these lessons

outlined the challenges encountered within the delivery model in England of offering variable fee rates to providers. It was therefore decided that the Offer in Wales would include a standard universal hourly rate that would be paid to all providers delivering childcare funded by the Offer.

- 4.21 The childcare sector in Wales is diverse, comprising of small, medium and large sized settings. Providers within the sector also face differing operating costs (e.g. staff, utilities, rent, catering and equipment etc) which are influenced by the delivery model of each setting as well as its geographical location. The Alma Economics report (2018) outlines that annual average operating costs of childcare settings in Wales can range from £7,096 (childminder) to £188,000 (full day care setting). The review also outlines that average costs per child per hour varies from £1.90 in childminder settings to £6.34 in full day care settings. These varying costs are often reflected in the fees that these settings charge to parents.
- 4.22 Setting one standard hourly fee rate that would be commercially viable for all providers operating across a wide range of settings was therefore challenging. However, an hourly rate of £4.50 was set, with the value being determined through consultation with the childcare sector, the Alma Economics research and a review of the Self-Assessment of Service Statement (SASS) data relating to childcare fee rates, submitted by childcare providers and collected by Care Inspectorate Wales (CIW). The majority (88 per cent) of the childcare providers interviewed, during the course of this evaluation, were of the view that this fee rate was commercially viable for their business. Childcare sector representatives echoed these views, but also noted the importance of ensuring that the rate would be reviewed on an ongoing basis so that it rises in line with inflation and takes account of any sector-specific cost increases incurred by providers.
- 4.23 Most providers interviewed (72 per cent) noted that the Offer had improved the profitability of their setting, and a similar proportion (76 per cent) noted that the Offer had improved the sustainability of their business. One sessional childcare provider noted that the introduction of the Offer had made the difference between keeping the setting open and having to close. Increases in profitability were reported in many cases to be partly due to the Offer hourly rate being higher than the hourly

rate usually charged (see Table 4.1 for the range of usual charges); thus, increasing the hourly return per child. Increases in profitability were also attributed by some providers to an increase in the number of Offer-funded children who were now registered within their setting. The main reason reported for increases in sustainability was due to existing children within their setting accessing more hours of childcare each week as a result of the Offer.

- 4.24 The commercial viability of delivering Offer-funded childcare is also influenced by the ratio of children to adults stipulated by the national minimum standards (see 1.23). In a day care setting, the minimum staffing ratio for children aged two or younger is 1:4 - this ratio changes to 1:8 for children aged three and above. It follows therefore that staffing costs per child are usually lower for three and four-year-old children compared to younger age groups and this can influence commercial viability and profitability.
- 4.25 This accompanied by the fact that most providers interviewed were of the view that the fee rate they receive through the Offer has improved their overall profitability, may suggest the Offer could encourage providers to prioritise childcare places for three and four years. This in turn could displace provision away from younger age groups. However, providers interviewed noted that this was unlikely to happen. Generally, providers noted that they preferred to accept younger children into their care in order to maintain a continuation of care from babies to primary school. This preference was partly due to ensuring a sustainable flow of children in their care and also a desire to develop an ongoing rapport with the children in their care.
- 4.26 The actual staffing ratio required within settings in order to meet the requirements also influences commercial viability and in some cases the ability and willingness of providers to take on additional children. For example, a setting with seven three-year-olds cared for by one member of staff could take on an additional child of the same age and maintain the staffing ratios required. In addition, taking on the extra child would reduce staffing costs per child and the extra fees would increase overall revenue. However, taking on a ninth child would require the setting to take on an additional member of staff to maintain the staffing ratios required. As a result, even though the fees paid by the additional child would increase overall revenue, this is

likely to be more than offset by the additional staffing costs incurred. In this case the provider may be reluctant to take on an additional child even if they had the capacity in terms of space and CIW registration to do so.

‘even though our income has increased as result of retaining three additional children [under the Offer] who would otherwise have left, we've taken on an additional member of staff specifically to look after these children - therefore overall, we're breaking even. If we could have more children under the Offer, then we would make a profit’

- 4.27 Most providers interviewed (94 per cent) noted that they receive payments from the EILA Offer team in a timely and accurate manner. Some providers also noted that receiving regular Offer payments from a trusted source, the local authority, provided them with more financial sustainability and reassurance than would otherwise be the case if they were reliant on chasing payments from parents. Many providers noted that they had encountered some early teething problems with the payment systems developed by EILAs but were also keen to outline that these had been quickly resolved.
- 4.28 Differences in payment timings were also reported with some EILAs paying providers in advance while others issue payments in arrears. For some providers who had established an advance payment arrangement with parents, the adjustment to being paid in arrears had been challenging and had posed some cash flow difficulties at the start. The extent to which these payment arrangement changes influenced providers, depended on the proportion of childcare funded children they had within their setting. However, almost all providers agreed that current payment arrangements were working well and those who had encountered short-term cash flow issues had adjusted their business finances to accommodate this.
- 4.29 One sector organisation raised concerns however, about the potential influence of the Offer on the longer-term sustainability of some providers. They noted that providers who charge parents not supported by the Offer, a rate much lower than the £4.50 per hour paid by the Offer, may become over reliant on the revenue from the Offer to support their business. This is especially the case if the provider uses

the additional income gathered from the Offer to keep fees for paying parents artificially low. If revenue from the Offer for these providers, were to suddenly stop for some reason, then the financial situation of their setting would soon become unsustainable.

Accessing business support

- 4.30 Despite the positive influence of the Offer on profitability and sustainability of the majority of childcare providers interviewed for the evaluation, the vulnerability of providers outlined in the review of the childcare sector report (Welsh Government, 2018) due to low profit margins are likely to remain a concern across many childcare settings. This would suggest that providers would benefit from accessing business support, this may be particularly the case if they need to introduce any changes to their business in response to the Offer.
- 4.31 Most providers interviewed (75 per cent) noted that they had not accessed additional business support following the introduction of the Offer. Although some of these expressed an interest and a recognition of the potential benefits of accessing support of this nature, most were of the view that they did not need any business support, relying instead on their experience of providing childcare, in many cases, over several years.
- 4.32 Those who noted that they had accessed business support said they had accessed this from their representative organisation e.g. Mudiad Meithrin, NDNA Cymru, PACEY. In many of these cases, what was being referred to by the childcare provider as 'business support' was in fact support with policies or access to training, as opposed to business planning and financial projections. It would appear therefore that there is a clear need for further business support across the childcare sector but encouraging take-up of the support might be challenging. This is an area that may require further research and investigation.

Delivery costs and charging structures

- 4.33 Most providers (90 per cent) reported that their delivery cost per child had not changed as a result of the Offer. This is reflected by the fact that most providers, during the early implementation period, have not changed their delivery model or extended their operating hours. (see also section 4.10-4.14)
- 4.34 A few of those who had experienced increases in their delivery costs attributed this to the additional administration tasks involved in completing and returning monthly data on childcare places booked and taken up to their EILA. Others (mainly sessional childcare settings) had also experienced additional costs as a result of extending their opening hours and in some cases providing meals which they did not previously provide. Some childminders noted that they had introduced transport to and from FPN settings in response to the Offer and this had increased their overall delivery costs.
- 4.35 Under the Offer, childcare providers can charge parents for additional elements such as food, transport and off-site activities which incur a cost, up to a maximum of £7.50 a day. Of those interviewed, 15 per cent had introduced additional charges as a result of the Offer. Some of these additional charges have been in response to the increased costs associated with delivering additional services, as noted above. However, it should be noted that not all providers who had introduced additional services such as wraparound transport had also introduced additional charges. Among the 15 per cent who had introduced additional charges, a few noted that they had previously considered introducing these charges, and the introduction of the Offer had prompted them to finally implement them. It is possible therefore that these increased charges would have occurred in any case.
- 4.36 Others, mainly those whose usual childcare fee was higher than the £4.50 provided by the Offer, introduced additional charges to make up for the shortfall in fee revenue they incurred as a result of the Offer. A minority noted that they had introduced additional charges because they saw the Offer as an opportunity to do so. A few providers noted that they only applied these charges to parents who received the Offer. These providers did not appear to be aware that applying

additional charges in this way was not part of the guidance to charges issued by the Welsh Government and EILAs.

- 4.37 The additional charges introduced by these providers are not covered by the Offer funding, instead they are passed directly to the parents. In some cases, these additional charges replace some of the affordability barriers which the Offer aims to remove. However, it should be stressed at this point that some of the additional charges introduced by providers are relatively small. It should also be stressed that the majority of providers interviewed (85 per cent) have not introduced any additional charges. It should also be noted that many of the providers interviewed were very aware of the affordability of childcare to parents and many kept their fees as low as possible in recognition of this. This is one of the reasons why some settings within the childcare sector are recognised as having vulnerable sustainability.
- 4.38 A small proportion of providers interviewed (6 out of 150) noted that they had increased their fees for all parents as a result of the Offer. As with additional charges the reasons for introducing these were varied and are difficult to quantify.

Variation in charging structures

- 4.39 The fee paid by the Offer to participating providers is based on an hourly rate. However, many childcare providers set their fees for parents based on half-day or full-day rates. Relating daily charge rates to an hourly charge rate in order to accommodate the Offer's payment structure was a challenge for some providers at the start.
- 4.40 Most providers, who normally charge based on daily rates, typically consider a full day's provision to be equivalent to 10 hours of childcare, and a half day equivalent to five hours. In these cases, parents who are eligible for 20 hours of Offer-funded childcare, can use this funding to access two full days or four half days of childcare from this provider. The parent will then pay for any additional hours of childcare taken up each week themselves.

- 4.41 If the parent only requires childcare for seven of the ten hours, then in most cases the parent will still be charged for a full 10-hour day. Payments issued to providers through the Offer follow the same arrangements as those agreed between the parent and provider. In this example, 10 of the 20 hours of childcare funding available through the Offer would be used up each day even though only seven hours of childcare would be required. Although this appears to reflect an inefficiency in the use of the Offer, it only follows the same inefficiencies as those faced by all parents taking up similar childcare arrangements.
- 4.42 As noted above, the hours of childcare accessed beyond those supported by the Offer, are charged directly to the parents. In most cases, the provider will calculate the total number of childcare hours taken up each week, remove from this the number of hours funded by the Offer and charge the parents for the remaining hours at the providers' usual rate. However, some providers noted that they adopt a different approach to charging parents for additional hours. These providers calculate the total cost of childcare provided during a given week, remove from this the value of Offer fees they receive for the hours booked, and charge the parent the residual amount. As a result, the amount parents pay each week for additional hours varies according to the charging process implemented by the provider.
- 4.43 The guidance issued to providers by EILAs outlines that they should charge on the basis of additional hours and not residual fees. However, some providers argued that it was not commercially viable for them to charge on the basis of additional hours if their usual fees are higher than £4.50 per hour. Differing charging processes for additional hours also influence the affordability and accessibility of childcare for parents. Further guidance may therefore be required to ensure consistency in charging rates that ensure commercial viability for providers and affordability for parents.

Special Educational Needs (SEN) provision

- 4.44 A dedicated budget was available for each EILA to support the delivery and access of Childcare funded by the Offer to children with SEN. However, there has been relatively low use of this budget across all of the EILAs during the first year of

implementation. There are several reasons for this including uncertainty within the EILA Offer teams of how to allocate the budget, and concern about establishing support for a child with no guarantee for the support to continue. Due to the recent implementation of the ALN Bill in Wales, EILA Offer teams commented that there was perhaps uncertainty as to how the Act would impact the sector, as it had only recently come into force. The unified system of support for children with ALN, which the Act implements, emphasises the importance of delivering an integrated approach to deliver all aspects of children's early education and care in the Early Years. The EILA Offer teams wanted to see how this would work in practice before committing funds to deliver any new support.

- 4.45 EILAs who have accessed the SEN budget available have used it to fund one-to-one, specialist advice, training and 'backfilling' to facilitate staff training sessions for childcare providers. Different approaches have been adopted by EILAs to manage the SEN budget. One EILA required childcare providers to 'bid for resources', with others delivering training as requested by providers. As a result, SEN recognition and specific skills such as Makaton⁴¹ have been improved for some childcare providers. However, many childcare settings have not been able to attend this SEN training.
- 4.46 Support offered for children with SEN through the Offer has tried to mirror the support a child may receive for the Foundation Phase. Some EILA Offer teams have achieved this by 'informally borrowing expertise' from their Education department's Additional Learning Needs (ALN) team, in order to support childcare providers to deliver this support. However, for other EILA Offer teams it is not easy to access such expertise.
- 4.47 Due to the small number of children with SEN accessing the Offer, there are limited examples of impact on childcare providers. However, one childcare provider offered an example of a child in their setting who had been initially assessed to receive 50 per cent funded support within the Foundation Phase setting. It was decided that the child could receive the same funding support within the childcare setting.

⁴¹ Makaton is a language programme which uses signs and symbols with speech to help people communicate.

However, it became clear that the child needed more 1:1 care than could be provided with 50 per cent support. An appeal was made to increase the level of support provided and this was granted, and the child received 100 per cent SEN support while accessing the 20 hours of childcare available through the Offer.

Welsh-medium provision

- 4.48 The evaluation explored whether current Welsh-medium and bilingual provision met parental demand. Evidence on the availability of Welsh-medium childcare before the early implementation of the Offer suggests that there are gaps in the provision in some parts of Wales, and also that there is variation in the methods used to assess demand for Welsh-medium provision.⁴²
- 4.49 Much of the Welsh-medium provision under the Offer, and more widely in Wales, is delivered through *cylchoedd meithrin*, namely Welsh-medium playgroups supported by *Mudiad Meithrin*. In the Gwynedd and Anglesey EILA, a larger proportion of the full-day care and childminders were Welsh-medium, while in another EILA a group of after-school clubs facilitated by the *menter iaith* took part in the Offer, (see section 5.45 – 5.51).
- 4.50 Across the seven EILAs, fifteen *cylchoedd* were interviewed. Their experiences of the Offer (e.g. hearing about the Offer, promoting to parents) were broadly in line with other childcare providers, although slightly fewer of the *cylchoedd* had seen an increase in their numbers (four of the fifteen) compared to sessional day care providers more generally. This is a small sample however, and providers explained that the numbers of children always fluctuate. The *cylchoedd* were more likely than other providers to report a positive effect on profitability and sustainability and all of those interviewed said that the £4.50 was a viable rate. All of those *cylchoedd* able to share details of their fees explained that the Offer rate was higher than their usual hourly rate, sometimes significantly higher, which resulted in ‘less stress’ and ‘not so much pressure on the fundraising’ during the past year. None of the *cylchoedd*

⁴² Welsh Government (2017) [Cymraeg 2050: A million Welsh speakers](#). [Accessed 2 November 2018]

had introduced extra charges, and one of the fifteen had increased fees for non-
Offer hours.

- 4.51 There was a mixed picture in terms of capacity to expand – some reported vacancies while others reported waiting lists. A couple of the cylch providers referred to challenges in recruiting staff with the required Welsh language skills should they expand. There was very little evidence of a change in delivery to date with two cylchoedd having extended their hours and one planning to open for the school holidays for the first time; another couple reported that they were considering opening in the holidays. This is supported by evidence from Mudiad Meithrin who explained that they had encouraged cylchoedd to plan for holiday opening; however, they reported that they were aware of a cylch setting which had opened in the school holidays for the first time but had very few children attending so will no longer be offering holiday provision. There was also evidence of a reluctance to consider a change from term-time-only opening among this group of providers, and as one cylch leader explained, ‘we’re open the same days as the school since for ever, everyone in [village] knows; and staff can’t do it either since they’re with their own children’.

5. The Offer's impact on parents

- 5.1 This section considers the impact the Offer has had to date, on the employability and attitudes to work of parents who have accessed the Offer. It also considers whether families have more disposable income as a result of the Offer.
- 5.2 The findings presented are based on the online survey responses gathered from 555 parents accessing the Offer; 57 qualitative interviews with parents (36 of whom were accessing the Offer and 21 whom were eligible for the Offer but had not accessed it). The findings are also informed by the analysis undertaken of the monitoring data submitted by each EILA to Welsh Government.

The Offer's influence on parents - Key findings

Accessing the Offer



Most parents (60%)
heard about the Offer from existing
childcare providers



The majority (90%) **used the same childcare provider** as they had done before accessing the Offer



60% of parents used
informal childcare alongside the Offer



Applying for the Offer was reported to be **'very easy' or 'fairly easy'** by 92% of parents who successfully applied

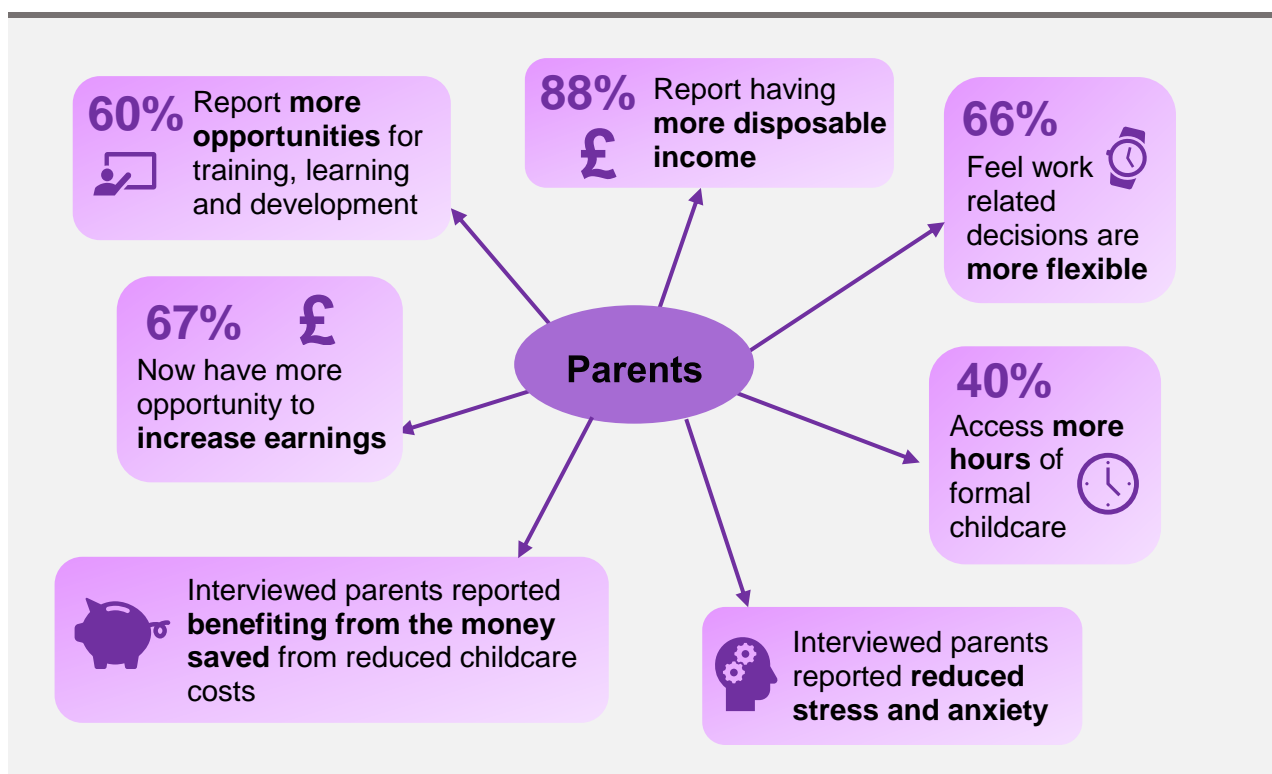
Cymraeg

37% of parents
accessed **Welsh-medium** childcare

59% of parents
accessed
childcare during
the **school holidays**



The majority (80%) of the lowest earning parents in each household **earn less than the Welsh median annual wage**



Other key findings

Awareness of the Offer

- In addition to hearing about the Offer directly from providers, **word of mouth and local authority letter/leaflet** were also key to informing parents about the Offer (for 26 and 24 per cent of parents respectively);
- Providers and EILA Offer teams reported that some parents were **initially wary** of the Offer, often lacking trust in something that seemed 'too good to be true' or assuming that as working parents it was not for them.
- Parents accessing informal childcare were **less likely to hear** about the Offer.

Demonstrating eligibility and applying for the Offer

- Some parents were initially **confused about the eligibility criteria**, particularly the emphasis placed on working 16 hours;
- The most reported difficulties for parents when applying for the Offer were providing the required documentation and the application being time consuming to complete.

Who is accessing the Offer?

- The **median salary band** of parents accessing the Offer during early implementation was £20,800 - £25,999.
- The median earnings of those accessing the Offer appears to be **comparable with the median earnings** of the general population in Wales.
- 60 per cent of parents accessing the Offer were **earning the equivalent of, or below, the Wales median salary**.
- 30 per cent of parents accessing the Offer were **earning £15,599 or less**.
- The **median salary for the lowest earner** in each household accessing for the Offer was £15,600 - £20,799.

Type of childcare accessed

- **Nursery class/school** were the most popular type of childcare reported by parents.
- Of the 60 per cent of parents who reported they were using informal childcare alongside the Offer 16 per cent noted they were using **less informal childcare** now

Flexibility of childcare and holiday provision

- Two-thirds of parents reported the types of childcare settings offering the **most flexibility** in meeting their needs were day nurseries, out of school childcare and childminders.
- **Fewer parents** accessed childcare during the school holiday periods than initially anticipated.
- A number of parents interviewed (seven out of 32) noted they were **unable to access** the childcare provision they required during school holidays.

Welsh language provision

- Due to the sessional nature of Welsh-medium playgroups or cylchoedd, 39 per cent of **parents accessed 10 or fewer hours** of childcare a week.

Impact on parents' employability

- The majority (86 per cent) of parents surveyed reported they currently work the **same number of hours** as before the Offer.
- The Offer has **marginally affected women's ability to work more hours** (12 per cent of 486 women), with a lesser impact reported by men (3 per cent of the 67 men surveyed).

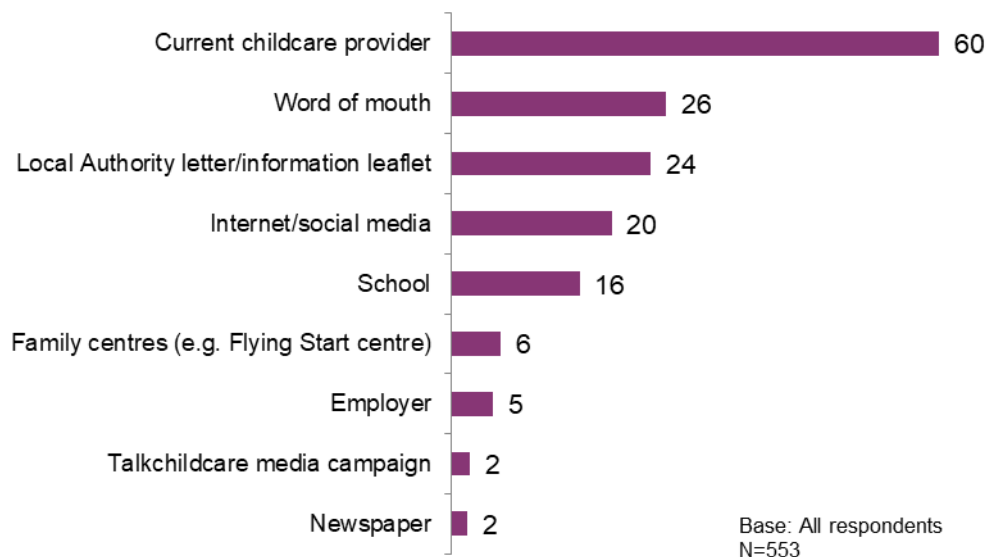
Non-participation

- The main reason parents reported for not accessing the Offer was their existing childcare provider **not registered** to deliver it.
- Some parents noted that it was difficult to understand how the Offer and **Child Tax Credits** fitted together and that this created a barrier to participation. These parents were also of the view that they would be financially better off not accessing the Offer so that their tax credits remained unchanged.

Parents' awareness of the Offer

- 5.3 For eligible parents to access and potentially benefit from the Offer they must first know about it and how to apply for the support provided. Parents were most likely to hear about the Offer from their current childcare provider (60 per cent of parents surveyed), followed by word of mouth, a leaflet or a letter from their local authority (Figure 5.1).

Figure 5.1: How parents heard about the Offer %



Source survey of parents accessing the Childcare Offer in Wales (2018)

Note: Not all 555 respondents provided a response to this question.

- 5.4 Childcare providers have therefore played an important role in promoting the Offer and raising parents' awareness of it. This is confirmed by the fact that over 90 per cent of the childcare providers interviewed noted that they had promoted the Offer to parents. This process of disseminating information about the Offer to parents directly from childcare providers appears to have worked well in most cases. However, some parents noted that in a few cases the information they received from providers lacked clarity and led to some confusion regarding the detail of what they would be eligible for.
- 5.5 Parents approached their providers with initial queries about eligibility and the application process. Some providers noted that they had to repeat some messages several times to parents and in some cases offer direct support with the application process. If providers were unable to offer parents the information and/or support needed, they then referred them on to the EILA Offer team. Providers and EILAs explained that some parents were initially wary of the Offer, often lacking trust in something that seemed 'too good to be true' or assuming that it wasn't for them as working parents.

5.6 The communication to parents was affected by two factors – the pace at which the early implementation was set up meant that details were still being clarified at a time when parents needed information to plan ahead and by the fact that it was implemented only in certain areas. Parents provided feedback on both those points, for example,

‘I found out about the Offer from my neighbour and then found more information online, but when I approached my childminder she hadn’t heard about it. I found it difficult to find precise information about the Offer to start with and feel that it could have been briefed better. Both me and the childminder had to work through the brochure to exactly understand what I was entitled to and we weren’t sure how it worked with the school nursery.’ (Parent)

5.7 The reliance on childcare providers as the main source of promoting the Offer also limited the potential reach of this information, as it was mostly passed on to parents who already accessed formal childcare from them. As a result, parents accessing informal childcare arrangements, as well as those accessing formal childcare from providers who had not signed up to deliver the Offer, were less likely to hear about it. This is partially reflected in the fact that the majority of participating parents surveyed (94 per cent) noted that they were already accessing formal childcare provision before the Offer was introduced; 90 per cent of surveyed parents were using the same provider to access Offer-funded childcare as they had used before the Offer had been introduced.

Demonstrating Eligibility and Applying for the Offer

5.8 Parents wishing to access the Offer through their EILA. The application requires parents to provide evidence that they are eligible for the Offer. During the early implementation period, this included proof of residency in the EILA; the birth certificate of the child accessing the provision and proof of employment.

5.9 In order to meet the Offer’s eligibility criteria, parents must earn the equivalent of working 16 hours a week at national minimum wage or national living wage or more. Some parents outlined initial confusion about this eligibility criteria, originally

believing they were only eligible if they were *working* 16 hours a week. This suggests that the eligibility criteria were interpreted by some parents as being focused on the number of hours parents work rather than the amount they earn. For example, for one parent interviewed, this confusion initially led them to think they were not eligible for the Offer because they were working less than 16 hours a week.

‘One thing that confused me at the start was the requirement that parents needed to work 16 hours a week. At the time I only worked 15 hours a week (although earning well above the minimum wage). I contacted my employer to ask if I could increase my hours. It was only later that I realised I would have been OK working the 15 hours.’ (Parent)

- 5.10 This confusion suggests a need for clearer communication to parents in relation to the eligibility criteria. The information communicating the eligibility criteria could place more emphasis on the amount parents are required to be earning in order to qualify for the Offer, rather than the number of hours parents work.
- 5.11 A couple of parents interviewed, and some providers, referred to the confusing landscape of many schemes available to help pay for childcare costs. Providers tended to refer straight to the EILAs, who in turn usually had to refer on to the HMRC helpline but were often suspicious that the information provided by the helpline was not always correct. Case study 1 summarises one mother’s experience of trying to find out how the Offer sat with the tax-free childcare she was already claiming. Providers named voucher schemes and child tax credits as other queries that parents raised with them.

Case Study 1:



Application and Tax-free childcare: The mother received clear information from her daughter's nursery and thought that the forms were straightforward. Mum was claiming tax-free childcare at the time of the initial application and *'nobody seemed able to tell me how the tax-free account and the Childcare Offer would affect each other'*. She spoke to a few different people at the EILA and *'the two things didn't seem very joined up'*. Mum explains that she's comfortable phoning around *'to get all the information I need - if I wasn't I may have given up and not accessed the Offer'*.

Holidays: The mother didn't realise though that only 9 weeks of 13 weeks of holidays are included in the Offer - this came as a bit of a shock

Employability: In the mum's previous role her employer paid for half the childcare costs, but the opportunity came for promotion, with more responsibility more career prospects and more money - but no childcare support but *'this meant that I'd be worse off financially in the short term because the increase in childcare costs outweighed the increase in salary'*. Mum explains that she *'may have taken the promotion anyway but the Childcare Offer definitely made the promotion more affordable'*.

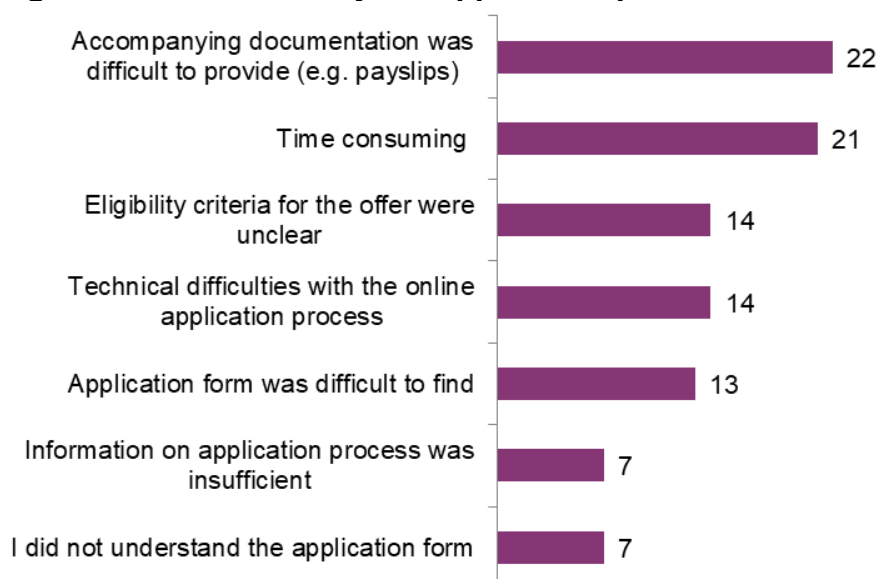
- 5.12 Parents apply for the support through their EILA and most of the parents surveyed (92 per cent) - who had successfully signed up for the Offer - thought that it was very easy or fairly easy to apply while 8 per cent thought that it was fairly difficult or very difficult (Figure 5.2). However, there were slight variations across the EILAs with almost all parents (98 per cent) in Gwynedd and Anglesey describing the process as easy, dropping to 83 per cent in Blaenau Gwent – one of the few EILAs to accept paper applications (and where some 80 per cent of their application was by post).

5.13 Findings from interviews with parents support these survey findings, with interviewed parents reflecting on how straightforward the application process was for them. For example, one parent provided the following comment:

‘The application process was really straightforward - all the evidence required could be uploaded by e-mail.’ (Parent)

5.14 For surveyed parents who found the application process challenging, the most commonly cited reasons were that it was difficult to provide accompanying documentation and that the process was time consuming (Figure 5.2).

Figure 5.2. Reasons why the application process was difficult



Base: Respondents who found application process difficult (N=48)

Source: survey of parents accessing the Childcare Offer in Wales (2018)

Note: Respondents could choose more than one option – as such total responses (98) exceed the number of individuals who responded to this question (48 =N)

5.15 While it is encouraging that the majority of respondents found it easy to apply for the Offer, it should be noted that the parents in this survey were those who successfully signed up for the Offer. The survey was not able to identify and capture the views of those parents who tried to apply for the Offer but did not succeed. However, the interviews with eligible parents who had not accessed the Offer revealed some challenges in applying for the Offer, as discussed in section 5.64.

Who is accessing the Offer?

Income

- 5.16 A particular focus of the evaluation was to examine the earnings of those accessing the Offer and to establish whether it was mainly low, middle or high earners who were accessing the Offer during the early implementation phase.
- 5.17 Families accessing the Offer were either single or two parent/guardian households. Within the sample of 555 parents who responded to the survey, most (63 per cent) were qualified to university degree level or higher. This suggests that most parents taking up the Offer are those who are well educated and therefore have higher earning potential. This information, however, is not gathered as part of the monitoring data relating to all participating parents gathered by EILAs, so this information is for those parents responding to the survey, and as such, some caution is required when interpreting this data in terms of a profile of all participating parents.
- 5.18 The salaries of all participating parents are gathered through the monitoring data. This data was gathered at the point parents applied for the Offer, which could have been at any point between September 2017 and August 2018. Individual parents' salaries have been gathered in salary bands rather than actual salaries, therefore the following discussion is based on analysis of individual parents' salaries rather than household income. Analysis of this data reveals that the median annual gross salary band of individual parents accessing the Offer during the early implementation phase was **£20,800 - £25,999**.⁴³
- 5.19 In 2017, the median gross weekly earnings for Wales, as recorded by the Annual Survey of Hours and Earnings (Office of National Statistics)⁴⁴, was £498, equating to annual gross weekly earnings of £25,896. The median gross annual earnings of those accessing the Offer appears comparable therefore to the median earnings of the general population in Wales.

⁴³ Parents' salaries were recording by salary bands. These salary bands were as follows: Up to £5,199; £5,200-10,399; £10,400-15,599; £15,600-20,799; £20,800-25,999; £26,000-31,199; £31,200-36,399; £36,400-51,999; and £52,000 or above.

⁴⁴ StatsWales Average (median) gross weekly earnings by UK country - English region and year. Available at statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Earnings/medianweeklyearnings-by-ukcountryenglishregion-year

5.20 Further analysis of the monitoring data outlines that 60 per cent of parents accessing the Offer during the first year were earning the equivalent or below the Wales median annual salary; with 30 per cent earning £15,599 or less. The proportion of participating parents falling within each salary band, as recorded by the monitoring data is presented in Table 5.1 and demonstrates that parents accessing the Offer were mainly middle and low earners.

Table 5.1. Proportion of participating parents within each annual gross salary band between September 2017 and August 2018

Annual gross salary bands	Proportion of parents accessing the Offer (%)
Up to £5,199	1.50
£5,200-10,399	14.18
£10,400-15,599	14.36
£15,600-20,799	14.72
£20,800-25,999	15.42
£26,000-31,199	13.45
£31,200-36,399	9.84
£36,400-51,999	12.94
£52,000 or above	3.63

Source: EILA Childcare Offer monitoring data

5.21 The annual gross salary figures referred to above, reflect the salary bands of all parents accessing the Offer. They, therefore, outline the highest as well as the lowest salary bands within two-parent households. The employability aims of the Offer include providing working parents with the opportunity to increase their current working hours (see also paragraphs 5.53 – 5.55 below). Opportunities to increase working hours are likely to be highest among parents who currently work part-time or irregular hours. These also tend to be the lowest earning parent within the household.

5.22 Additional analysis of parents' salaries was therefore undertaken to examine the average annual gross salary of the lowest earner within each household at the time they applied for the Offer. This showed that the median annual gross salary band for the lowest earner within each household was **£15,600 - £20,799**, which is below the median earnings of the general population in Wales. This indicates that the majority (80 per cent) of the lowest earners within households taking up the Offer

earn less than the median earnings of the general population in Wales (see Table 5.2). This is likely to partly reflect the fact that those taking up the Offer are likely to be working part-time because they have young children.

Table 5.2. Proportion of lowest earner within each household within each annual gross salary band between September 2017 and August 2018

Salary bands	Proportion of parents accessing the Offer (%)
Up to £5,199	2.52
£5,200-10,399	23.32
£10,400-15,599	20.98
£15,600-20,799	18.11
£20,800-25,999	14.62
£26,000-31,199	8.90
£31,200-36,399	5.14
£36,400-51,999	5.24
£52,000 or above	1.17

Source: EILA Childcare Offer monitoring data

Type of childcare accessed

- 5.23 This section reviews the type of childcare accessed through the Offer. It begins by considering the extent to which the Offer has influenced a shift from informal to formal childcare arrangements. It then goes on to consider the type of formal childcare accessed.

Movement from informal to formal childcare

- 5.24 The evaluation aimed to understand changes in parental demand for formal childcare provision among those accessing the Offer. Previous research shows that almost four-fifths of parents in Wales (76 per cent) use informal childcare⁴⁵. The use of informal care is much higher in Wales than in other parts of the UK, such as in England where surveys⁴⁶ find that only 36 per cent of families use informal arrangements. Rates of informal care have been shown to be highest among

⁴⁵ National Survey for Wales childcare data 2016/17

⁴⁶ Department for Education 2017 Childcare and Early Years Survey of Parents in England, 201. Available at assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/669857/SFR73_2017_Text.pdf [Accessed 25 October 2018]

families with three- and four-year-olds. Given the opportunity and neutral cost of the Offer, eligible parents may choose to rely less on informal care – and grandparents in particular - and rely more on formal childcare arrangements. That is not to say that grandparents will be totally liberated as the parent survey findings indicate that most parents use more than one provider in order to access both the childcare and FPN strand of the Offer. Informal carers are, therefore, likely to continue to have a major role in coordinating transitions and filling gaps between the Foundation Phase Nursery Provision and formal childcare.

- 5.25 Data from the parent survey suggests that the introduction of the Offer has resulted in a shift from informal to formal care among some parents (16 per cent of those surveyed). The modest transfer of care from informal to formal childcare is likely to be directly related to other findings in the survey of parents, particularly the modest change to date, in the number of hours that parents worked before and after taking up the Offer. Further transfer from informal to formal may follow as the Offer is made more widely available across Wales and an unintended consequence of this may be increased opportunities for grandparents to work once they are needed less for informal care.

Type of formal childcare accessed

Parents surveyed were asked what type of childcare they were using to access the Offer. The most commonly cited providers were nursery class (used by 52 per cent of parents) and day nurseries (used by 42 per cent of parents). Parents also used Welsh-medium playgroups, childminders, nursery schools, playgroup/preschool and out of school childcare. However, it is not known how parents distributed the take-up of Offer funded childcare and FPN provision across these different providers.

- 5.26 Research shows that while some parents, in general, may express a strong preference for informal care, others say that it is a necessity born out of the shortcomings of formal care, namely the expense or inaccessibility. Therefore, parents may have no option but to call upon family (mainly grandparents)⁴⁷ to provide

⁴⁷ Dallimore, D. 2016 Informal Childcare and Childcare Choice in Wales. Bangor University.

informal care. With rates of informal care having been shown to be highest among families with three- and four-year-olds, it was predicted that given the opportunity and neutral cost of the Offer, eligible parents would choose to rely less on informal care. The Offer was expected to cause an increase in demand for formal childcare as eligible parents previously using informal childcare may shift to using formal childcare funded through the Offer.

- 5.27 However, the evaluation found that almost all (94 per cent) parents surveyed had used formal childcare prior to accessing the Offer. Furthermore, 90 per cent of parents accessed the Offer using the same childcare provider as they had done before. This is supported by the qualitative interviews with parents, which found that, in many cases, parents were already paying for childcare before accessing the Offer and continued to access the same childcare provider through the Offer. For example, one parent, who was accessing a private childcare provider five days a week, provided the below explanation.

‘This is the same arrangement as I had in place prior to the Childcare Offer. I book all the 20 hours of childcare available through the Offer as well as additional hours which I pay for. I always use the full 20 hours of childcare that is available to me.’ (Parent)

- 5.28 This finding, coupled with the fact that many parents reported first hearing about the Offer from their childcare provider, poses the question as to whether eligible parents not accessing formal childcare are aware of the Offer. This lack of awareness may suggest efforts need to be concentrated on wider promotion of the Offer in order to ensure it is reaching all eligible parents, particularly those who are only accessing informal childcare.
- 5.29 In terms of the hours of childcare accessed, 60 per cent of parents surveyed were accessing the same number of hours of childcare as they were before receiving the Offer and 40 per cent were using more hours of formal childcare. Interviews with parents identified examples of parents accessing more hours of formal childcare as a result of the Offer, as illustrated in case study 2.



Case Study 2

The family has a 3-year-old son who is accessing the Offer and a 7-year-old daughter. Before accessing the Offer, the son was attending FPN in the local school in the morning and was then picked up at lunch time by the mother or another family member. This was quite difficult to work around with the 7-year-old daughter needing to be picked up after finishing school at 3.30pm. Since accessing the Offer, the son stays at the school in the afternoon, accessing the additional childcare hours funded through the Offer. This allows the mother to pick both her son and daughter up at the same time when school finishes at 3.30pm.

- 5.30 These findings suggest that any increases in demand for formal childcare generated by the Offer came from parents already accessing formal childcare but wanting to increase the amount of formal care they accessed.
- 5.31 Although almost all parents surveyed had used formal childcare prior to accessing the Offer, 60 per cent noted that they were using informal childcare alongside the Offer. This informal care still plays a major role in filling gaps between the FPN provision and formal childcare that makes up the Offer. However, the Offer appears to have reduced parents' reliance on informal care, as 16 per cent of parents surveyed noted that they were using less informal care since accessing the Offer. This is supported by interviews with parents, as illustrated in case study 3.



Case Study 3

The mother works four days a week. Before accessing the Offer, her daughter was attending a nursery for three days a week and grandparents were looking after her for the fourth day of the week when the mother was working. Since accessing the Offer her daughter has been attending the local school full-time for four days a week – doing her FPN session in the morning and the additional childcare hours, funded through the Offer, in the afternoon. Accessing the Offer has meant that the mother has needed to rely less on grandparents for childcare.

- 5.32 By reducing parents' reliance on informal care, the Offer has relieved grandparents from some of their childcare duties, which may potentially enable them to go back to work or to increase their working hours (if they are already working). Therefore, the Offer may have had the unintended consequence of increasing opportunities for grandparents to work once they are needed less for informal care. However, this was out of the scope of the evaluation and was therefore not explored further than the anecdotal evidence offered by childcare providers.

Flexibility of childcare

- 5.33 The evaluation aimed to establish whether childcare provision funded through the Offer is sufficiently flexible to meet parents' requirements. A key aspect of flexibility is being able to choose the number of hours and times of day with a preferred provider. The different types of providers varied in their ability to offer flexibility. The parent survey findings suggest that day nurseries, out of school childcare and childminders may offer the most flexibility, with over two thirds of parents surveyed who were accessing these type of providers (71 per cent, 73 per cent and 66 per cent respectively) noting that they were able to freely choose the days and times when their child attended the childcare provider. Just over half (56 per cent) of surveyed parents accessing playgroups noted they could freely choose when their

child attended, compared with one third (34 per cent) of surveyed parents accessing a nursery school/class.

- 5.34 Interviews with parents revealed they were generally of the opinion that the provision available was sufficiently flexible to meet their needs. This is partially reflected in the fact that most parents (90 per cent of surveyed parents) were using the same provider to access Offer-funded childcare as they had used before receiving the Offer and many were also accessing the same number of hours (60 per cent of surveyed parents). However, of the parents interviewed, some had not been accessing formal childcare before the introduction of the Offer. These parents also tend to express positive views of the availability of sufficiently flexible childcare provision.
- 5.35 However, one parent interviewed thought the childcare provision could be more flexible. This parent was considering increasing their work hours, but in order to do this, they needed to increase the hours they accessed with their childcare provider. However, this request was unable to be accommodated, and consequently, this parent was not able to increase their work hours. Although this example is in the minority, it does demonstrate how lack of flexible provision can potentially create a barrier to increasing work hours for some parents.

Take-up of childcare during school holidays

- 5.36 During school term time, children supported by the Offer are entitled to at least 10 hours of FPN and up to 20 hours of funded childcare. The combination of the FPN and funded childcare provision makes up the 30 hours of funded education and childcare included in the Offer. During nine of the 13 weeks' school holidays each year, when there is no FPN provision, the 30 hours of the Offer consists entirely of funded childcare. The ability of the childcare sector in Wales to meet a potential increase in demand for childcare during school holidays was a point of concern for many during the early implementation phase.
- 5.37 However, the evaluation findings suggest that demand for childcare has not exceeded supply during school holidays as was initially feared by some. The main

reason for this appears to be that fewer parents accessed childcare supported by the Offer during school holidays than anticipated. These findings are discussed in more detail in the separate holiday provision paper published alongside this report.

5.38 The survey of parents conducted in May 2018 found that just over half (59 per cent) of the responding parents who accessed the Offer were currently using childcare in school holidays with a further 10 per cent noting that they were planning to.

5.39 Out of the 31 parents interviewed who noted whether they were accessing fewer, more or the same number of childcare hours in school holidays compared to term time, 16 noted that they were accessing fewer hours in the school holidays, seven were accessing more and eight were accessing the same number of hours as they were during term time.

5.40 Most parents interviewed appeared to be happy with the childcare provision available during school holidays. When asked whether they were able to access, through the Offer, the type and amount of childcare that they need during school holidays, 25 parents (out of 32 who responded to the question) parents said they were able to. However, seven parents (out of 32 who responded to the question) noted that they were not able to access the provision they required during school holidays.

5.41 The main reason given by the seven parents who were not able to access the childcare provision they required in school holidays was that their term-time childcare provider did not offer any provision during school holidays. These parents had to make alternative childcare arrangements including informal care, which has not been an issue for some parents but has been less convenient for others.

‘During the Summer I was really struggling. Both nursery and school wraparound were not open during holidays. I've had to beg, borrow and steal time and help from family members, and also take annual leave if I couldn't find help. It's been a logistical nightmare.’ (parent)

5.42 Awareness and understanding of the childcare provision available and supported by the Offer during school holidays has not been transparent in all cases. Some parents were unaware that they were entitled to funded childcare during school

holidays while others were unaware that the Offer only funded nine of the 13 weeks of school holidays available each year.

- 5.43 The reliance on childcare providers to raise awareness of the Offer and school holiday provision has worked well in some cases but less in others.
- 5.44 Overall, the initial concerns relating to the potential over demand and undersupply of childcare provision during the school holidays did not emerge during the early implementation of the Childcare Offer in Wales. However, this does not suggest this will continue to be the case as the Offer is rolled out over the longer term.

Parents' access to Childcare Offer funded Welsh-medium provision

- 5.45 The evaluation explored whether current Welsh-medium and bilingual provision funded by the Offer met parental demand. Prior to the launch of the Offer, some stakeholders had expressed concerns that as Welsh-medium playgroups, or *cylchoedd*, are a key provider of Welsh-medium childcare, and given that these are mostly sessional day care (often delivering ten hours of provision or less per week), then some parents would not be able to access all the childcare hours they are eligible for or require through the Offer, from sessional providers such as *cylchoedd meithrin*. The concern was that in order to fully access the childcare strand of the Offer, parents would move their children from the *cylchoedd meithrin* to other settings that delivered more hours of provision but may not necessarily deliver Welsh or bilingual provision. This, in turn, would reduce the take-up of Welsh-medium childcare and therefore limiting progress towards the Welsh Government's strategy vision of reaching a million Welsh speakers by 2050.
- 5.46 The evaluation findings show that parents have been able to use the Offer to access Welsh-medium provision and that there is no evidence to date of a shift in demand away from Welsh-medium childcare towards non-Welsh-medium provision. In addition to this, as outlined in section 4 above there is no evidence to date to suggest that the Offer has had a substantial influence on the delivery of Welsh-medium provision either; although some Welsh-medium settings did note that they had, or were considering, changing their opening hours as a result of the Offer.

According to the monitoring data, on average, over the first year, 37 per cent of children supported by the Offer accessed Welsh-medium childcare provision. The proportion of children accessing Welsh-medium childcare through the Offer during the first year ranged from none in Swansea and 5 per cent in Flintshire to 91 per cent in Gwynedd and Anglesey. No children accessed Welsh-medium provision through the Offer in Swansea where the *cylchoedd meithrin* are not as well-used as in other areas and where some of these smaller *cylchoedd* were reluctant to register for the Offer.

- 5.47 Although the proportion of parents accessing Welsh-medium provision funded by the Offer varied across EILAs, the survey findings indicate that the proportion of parents able to access Welsh-medium and bilingual provision, before and after the Offer was introduced, has remained broadly the same (see figure 5.3).
- 5.48 The survey findings also indicate that the proportion of parents across all EILAs who would have liked to access Welsh-medium childcare but were unable to before the Offer was introduced fell from 10 per cent to 4 per cent after the Offer was introduced (see figure 5.3). A similar trend was noted by respondents across most EILAs. This suggests that a shift away from Welsh-medium provision as a result of the Offer has not occurred to date.

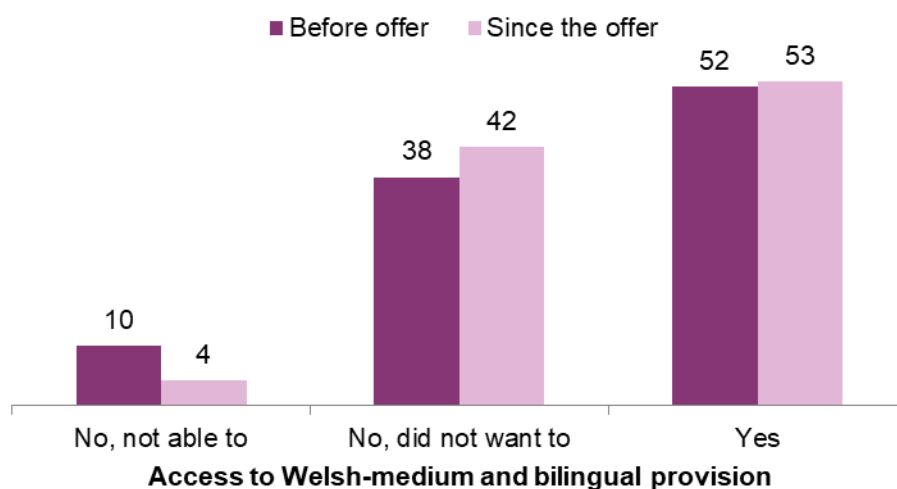
Access to Welsh-medium provision during school holidays

- 5.49 All EILAs recorded a fall in the number of children accessing Offer funded childcare during the school summer holidays in August. On average, across all EILAs the number of children accessing formal childcare was 35 per cent lower in August 2018 compared with the previous month. There are a number of likely reasons for this including a fall in demand for childcare among parents who work term time only as well as those taking their children on family summer holidays. This is accompanied by a fall in supply among childcare providers that only operate during school term time.
- 5.50 The number of children accessing Welsh-medium childcare funded by the Offer across all EILAs fell by 59 per cent (from 1327 to 540) between July and August

2018 – a substantially larger fall than the 35 per cent drop (i.e. from 3430 to 2233) recorded across all childcare settings. The largest fall in the number of children accessing Welsh-medium provision in this period was recorded in Gwynedd and Anglesey, where the highest proportion accessing Welsh-medium provision is also recorded. The relatively higher drop in the number accessing Welsh-medium provision, compared to all provision, during school holidays may reflect demand factors that are specific to Gwynedd and Anglesey and/or supply factors that relate predominately to Welsh-medium provision. However, when we compare the proportional change in the number accessing Offer funded childcare during school holidays across other EILAs, not including Gwynedd and Anglesey, the fall is 66 per cent for Welsh-medium provision compared to a fall of 27 per cent in the number accessing all types of provision.

- 5.51 The lower level of access of Offer funded Welsh-medium provision during the school summer holidays in part, reflects the fact that much of the Welsh-medium childcare is delivered through *cylchoedd meithrin*, most of which operate during term-time only. However, it is not possible to conclude from these findings that the fall in access is predominantly supply driven or that there is necessarily a mismatch between the supply and demand of Welsh-medium childcare during school holidays. The findings may simply reflect the way Welsh-medium provision has traditionally been delivered and accessed during school holidays. Further research is required in this area to determine whether this is a point of concern or not.

Figure 5.3 Changes in access to Welsh-medium and bilingual provision since the Offer %



Base: All respondents
N=472

Source survey of parents accessing the Childcare Offer in Wales (2018) Question asked about access to Welsh-medium/bilingual provision.

Note: Not all 555 respondents provided a response to this question

Impact of the Offer on employability

5.52 A key aim of the Offer is to improve the current and future employability prospects of parents by reducing childcare costs as a barrier to employment. The evaluation therefore focused on the extent to which the Offer has supported improvements in parents' current and future employability prospects. This section examines the impact of the Offer on parents' employment and employment-related decision making.

Influence on hours worked

5.53 The survey of participating parents asked respondents to note whether the Offer had enabled them to work more hours. The survey shows that parents' work hours were fairly constant before and after taking up the Offer. The majority of respondents (86 per cent) stated that they currently work the same number of hours as they did before the Offer was introduced. Parents who took part in the qualitative interviews also explained an increase in work hours,

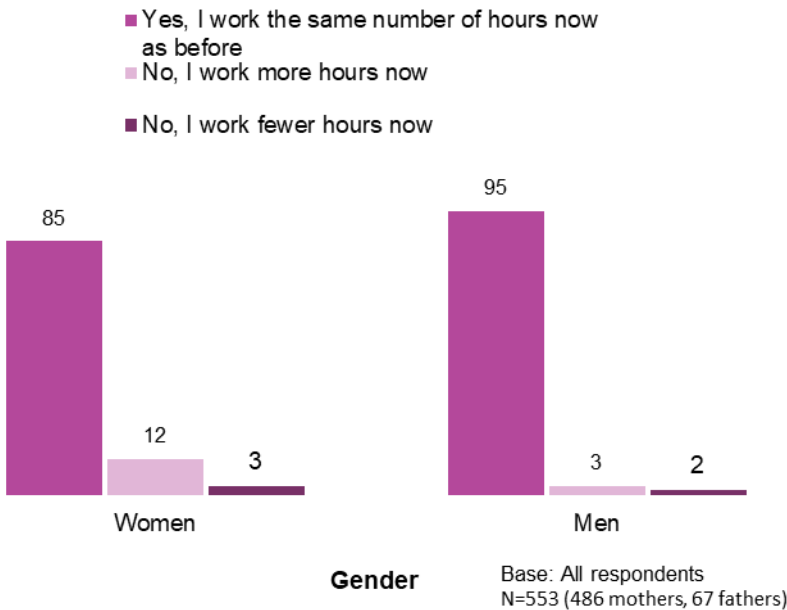
‘I was working 16 hours, but since [the Offer] increased to 25 hours.’ (Parent)

‘Since September 2017 I now work additional hours every week.’ (Parent)

‘Changed hours due to Offer, so I can spend more time with the children during weekends.’ (Parent)

5.54 However, women and men responded differently to the Offer (see figure 5.4). While only three per cent of the 67 men who responded to the survey work more hours since taking up the Offer, 12 per cent of the 486 women who responded to the survey work more hours now than they did before the Offer was introduced. This suggests that the Offer has marginally affected women’s ability to work more hours.

Figure 5.4. Whether Offer had changed respondents’ work hours by gender %



Source survey of parents accessing the Childcare Offer in Wales (2018)
Note: Not all 555 respondents provided a response to this question

5.55 Sections 5.16 to 5.22 above summarises what is known about the salaries of parents accessing the Offer as recorded by the Childcare Offer monitoring data. The survey also recorded salary levels in the form of the gross annual household income of our sample of participating parents responding to the survey (see Table 5.3). The average (median) household income among survey respondents fell within the £41,600 to £51,999 category. The distribution of household income among survey responses appears relatively high in comparison to the individual

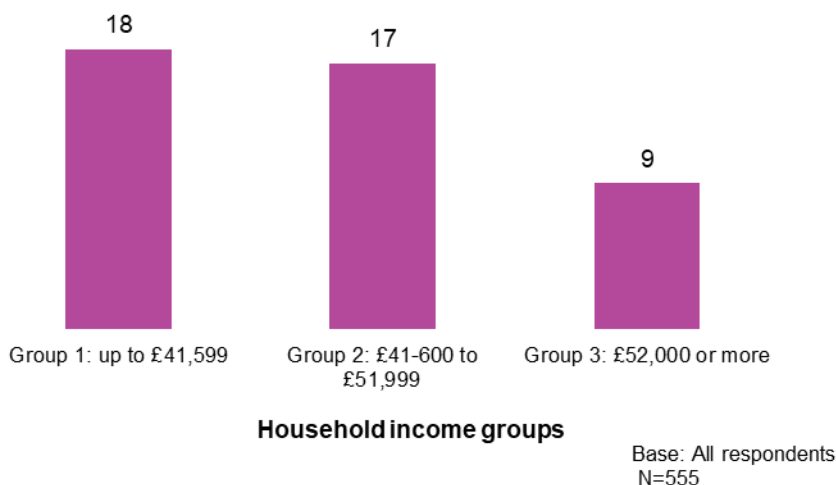
salary figures recorded within the monitoring data. This is likely to reflect the fact that the household income recorded in the survey data combines the salaries of both parents, in two parent families, and does not distinguish between the highest and lowest salaries within individual households.

Table 5.3. Annual household income of survey respondents (%)

Total household income per year	Percentage of survey respondents
Up to £10,399	1
£10,400 to £15,599	4
£15,600 to £20,799	5
£20,800 to £25,999	7
£26,000 to £31,199	10
£31,200 to £41,599	14
£41,600 to £51,999	25
£52,000 to £99,999	33
£100,000 or more	1
Total	100

- 5.56 For our analysis, three categories were created for subgroup analysis: group 1 (up to the median household income level of £41,599), group 2 (from £41,600 to £51,999) and group 3 (£52,000 or higher).
- 5.57 According to these survey findings the Offer seems to have affected the work hours of a greater proportion of parents who fall into the lowest household income group used in the survey (i.e. household incomes below £41,600 per annum) compared to those who reported household incomes of £52,000 per annum or more (see figure 5.5). Nearly 1 in 5 (18 per cent) of either parent in household income group 1 (up to £41,499) worked more hours than they did before. Conversely, only 1 in 10 (9 per cent) parents in income group 3 (earning £52,000 or more) have increased their work hours since taking up the Offer.

Figure 5.5. Percentage of parents (either respondent or partner) that work more hours since taking up the Offer by income group %

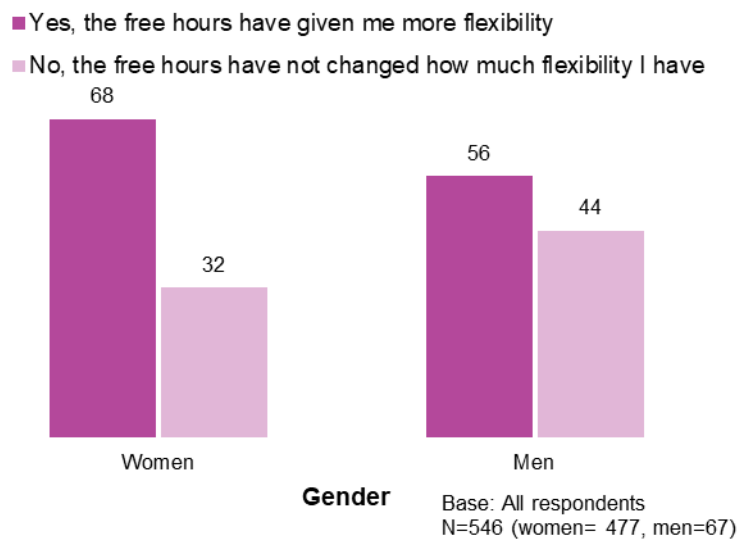


Source survey of parents accessing the Childcare Offer in Wales (2018)

Influence on flexibility in work decisions

- 5.58 The Offer appears to have had a noticeable impact on parents' flexibility in making work-related decisions. The survey asked parents whether the funded hours had given them more flexibility in which jobs they can do and how many hours they can work. More than two-thirds of parents (67 per cent) who responded to the survey noted having more flexibility since taking up the Offer (figure 5.6).
- 5.59 Women, and parents in household income group 1, were most likely to report having more flexibility. While more than half of the men that responded to the survey felt they had more flexibility (56 per cent), more than two-thirds of women (68 per cent) felt the same. Similarly, nearly three-quarters (73 per cent) of survey respondents in income group 1 (up to £41,599) reported having more flexibility after taking up the Offer in contrast to only 60 per cent in household income group 3 (£52,000 or more).

Figure 5.6. Flexibility in work decisions by respondents' gender %

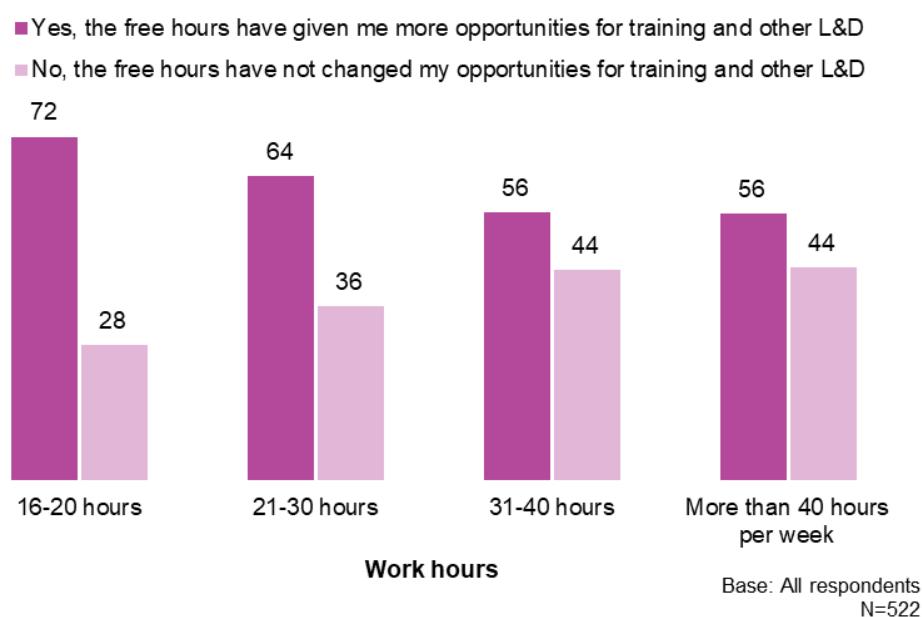


Source survey of parents accessing the Childcare Offer in Wales (2018)
Note: Not all 555 respondents provided a response to this question

Influence on increased learning and development opportunities

5.60 Overall, for three in five parent survey respondents (60 per cent), taking up the Offer had provided more opportunities for in-work training and learning and development (learning opportunities). Parents working part-time were most likely to say the Offer provided them with increased learning opportunities (Figure 5.7).

Figure 5.7. Whether respondent parents have more time for training by work hours (%)



Source survey of parents accessing the Childcare Offer in Wales (2018)

Note: Not all 555 respondents provided a response to this question

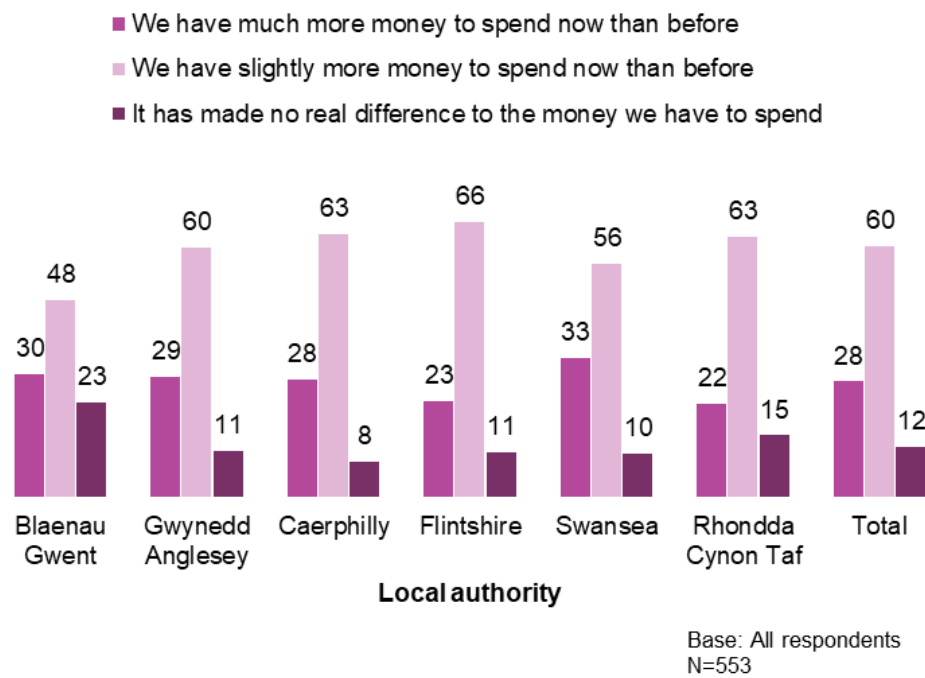
- 5.61 Overall the findings from the parent survey indicate that some women, and to a lesser extent, men, have increased their work hours as a result of accessing the Offer. Although most parents at this stage continue to work the same hours as they did before. Even though the Offer has not substantially changed parents' work hours per week, it has given them more flexibility to make work-related decisions and positively impacted their ability to engage in training and learning and development opportunities. It is possible that an increase in training opportunities and flexibility in making employment-related decisions could support parents in working more hours in the medium- to long-term.

Impact of the Offer on disposable income

- 5.62 The evaluation explored whether families have more disposable income as a result of the Offer. The evaluation findings suggest that the Offer appears to have had an impact on the disposable income of households accessing the Offer, with the majority of parents surveyed (88 per cent) reporting to have more money as a result of the Offer. Less than a third of respondents (28 per cent) reported having much

more money to spend since accessing the Offer compared to before and three in five respondents (60 per cent) stated that they have slightly more money to spend since accessing the Offer. The remaining 12 per cent reported that the Offer had made no real difference to the money they had to spend. This is likely to be because they were previously using informal childcare. Across the EILAs, figures varied slightly, with 23 per cent of respondents in Blaenau Gwent reporting that the Offer has made no real difference to the money they have to spend in contrast to eight per cent of those in Caerphilly (Figure 5.8).

Figure 5.8. Impact of Offer on family disposable income by local authority %



Source survey of parents accessing the Childcare Offer in Wales (2018)
 Note: Not all 555 respondents provided a response to this question

5.63 Increases in disposable income reported by parents has been largely due to the savings accrued from a reduction in childcare costs rather than by an increase in work hours (and thus income). However, the Offer was perceived by parents surveyed to provide the potential for parents to earn more, with just over two-thirds (67 per cent) of parents surveyed saying they thought the Offer provided more opportunities for them to increase future earnings.

5.64 The majority of parents interviewed (22 out of 30 parents) noted that they had benefited from money they had saved from reduced childcare costs as a result of the Offer. In particular, parents reported a reduction in levels of stress and anxiety previously caused by the worry of having to cover childcare costs.

‘The Offer has taken the pressure off, and I have saved £200 a month.... I had considered stopping work before I heard about the Offer, it's made a big difference.’ (parent)

‘The Offer has reduced stress and anxiety of trying to budget enough money monthly for childcare.’ (Parent)

5.65 Parents interviewed explained that they had been able to put the money saved on childcare costs towards a wide range of other expenses, such as after-school activities, house renovations, family days out, family holidays or mortgage repayments.

‘I would've been paying for it anyway I think, but it does help the family with saving money, and does make me feel that I'm working to move on and not just get by.’ (Parent)

Non-participation/parental choice

5.66 Parents interviewed included those who were eligible for the Offer and had considered accessing it but had decided not to or were unable to do so. The paragraphs that follow illustrate some of the main reasons given by these parents as to why they did not access the Offer. These views are based on views expressed by a relatively small sample of parents (21). The total number of parents who were eligible for the Offer but did not take it up is unknown. As such the findings presented below should be considered as illustrative examples as opposed to a representative overview of reasons for not taking up the Offer.

5.67 The main reason given by those interviewed, for not taking up the Offer was the fact that their childcare provider had not registered to deliver it. Most of these providers had claimed that they had not signed up to deliver the Offer as it was not commercially viable for them to do so. These settings were day nurseries whose

fees were usually higher than the £4.50 funded through the Offer. The parents noted that they realised that they could still access the Offer if they moved the child to another setting, however, those interviewed had either been unable to do this due to there being no suitable alternative providers or were reluctant to disrupt the settled childcare routine of the child. As a consequence, these parents continued to pay for all their formal childcare.

- 5.68 One parent noted that their provider (a sessional playgroup) informed them that they could not deliver the Offer as they were not open for 30 hours a week and therefore delivery of the Offer didn't apply to them. The misconception of this provider serves as an example to demonstrate the importance of ensuring that all providers and parents understand what the Offer entails.
- 5.69 In some areas the local authority funds 30 hours of FPN each week. Eligible parents in these areas cannot access additional hours of Offer-funded childcare during school term times but are eligible for up to 30 hours of funded childcare during the school holidays. Two of the eligible parents who had not taken up the Offer noted that they had not been able to access school holiday-only formal childcare from any local providers.
- 5.70 A couple of the parents noted that they had not accessed the Offer as in their view the process of providing employment eligibility evidence was too difficult. Both these parents were self-employed. One noted that they had simply assumed that the process would be too difficult and had therefore not pursued with their application beyond initial enquiries (although at the time of the interview she had just taken on employment and was applying for the Offer – see case study 4). The other had pursued the application further. However, they noted that each time they submitted what they considered to be the evidence required their application was met with requests for further information. The parent noted that in the end they 'gave up.'



Case Study 4

Self-employment: When the mother first heard about the Offer, she was self-employed and chose not to apply because she thought it would be too difficult to fill in the application form. She admitted that she *'hadn't really looked into it properly'* to find out what it entailed, she just assumed that it would be difficult to apply because both her and her husband were self-employed. At the time she was still with her husband, but when they separated a few months ago, the mother started working full-time in a retail role.

Applying for the Offer to make work worthwhile: The mother's decision to look for a job was influenced by the Offer. She explains: *'When my husband moved out, I needed to get more money and because the Childcare Offer was there, I did go to look for a job because of that... The Offer encouraged me to look for work because I wouldn't have been able to afford to go back to work full-time otherwise...It wouldn't have been worth me going back to work. It would cost about £150 a week for childcare if you're just paying for it; and I'm earning a couple hundred pounds. So, I would be making £50 a week and it wouldn't make sense.'*

- 5.71 Being already in receipt of help with childcare costs, such as tax-free childcare or tax credits, was a barrier to the accessing the Offer for some parents and it was difficult for parents – and providers – to understand how the schemes fitted together. One parent noted that they had calculated the 'pros and cons' of accessing the Offer instead of Tax Credits and had concluded that they would be financially better off not accessing the Offer so that their tax credits remained unchanged. See also case study 1.

Other reasons given for not taking up the Offer included one parent who didn't think their local provider could cater for the SEN needs of their child and could not find any alternative options that could be funded by the Offer. Another parent noted that

they accessed their childcare near where they worked in another local authority. As a consequence, neither they nor the provider had been aware of the Offer until, in the view of the parent, it was too late to do make the most of it.

6. Conclusions

- 6.1 The evaluation of the first year of the early implementation of the Childcare Offer in Wales has highlighted a number of benefits and challenges associated with developing, delivering and accessing the Offer. The sections below outline the main conclusions which can be drawn at this stage relating to the early implementation of the Offer, its influence on the childcare sector in Wales, early impact on the employment prospects of parents and household incomes, as well as general lessons that can be taken forward into the next stage of the Offer's rollout.

Early Implementation

- 6.2 Local delivery areas were identified, delivery teams established, and the application processes successfully implemented within what was widely considered at the time to be a very challenging timescale.
- 6.3 All early implementation areas had established agreements and processes with local childcare providers to deliver the Offer and were able to receive applications from parents by the middle of the summer of 2017. Almost all eligible parents who had successfully applied for the Offer were able to access the childcare they needed by September 2017.
- 6.4 Much of the success associated with the initial development and implementation of the Offer can be attributed to the good communication and working relationships developed between the Welsh Government and their local authority colleagues during that time. Some of these working practices may have been borne out of the necessity of working within pressured timescales, but the outcomes were positive. EILA Offer teams noted that they particularly welcomed the fact that the policy of the Childcare Offer was not placed upon them in a prescriptive way.
- 6.5 Some of this early success can also be attributed to the enthusiasm of the seven local authorities to get involved in the early implementation process and their determination to make the early implementation work well. The challenge moving forward will be to encourage the same level of enthusiasm and good working relationships with the new areas that will come on board in the near future.

- 6.6 The initial implementation period was not however, without its challenges. Some early teething problems were encountered with the payment systems to providers in some areas. These were resolved fairly quickly in most cases. A more sustained challenge reported by the EILA Offer teams has been the larger-than-expected administration burden associated with processing applications from parents. The additional administration support required was mainly associated with supporting parents to access the proof of employment required to process their application. This was particularly challenging for parents who were self-employed and those working zero-hour contracts or working irregular flexible hours. Some EILA Offer teams invested considerable time supporting parents to provide eligibility evidence. However, the majority of parents (92 per cent) surveyed felt the application process was straightforward

Communication and awareness raising

Providers

- 6.7 EILA Offer teams invested considerable time during the first half of 2017 engaging directly with local childcare providers to inform them of the Offer and encourage them to register as Offer providers. This was largely successful despite the fact that there were some important gaps in the information available during this time, particularly in relation to the hourly rate providers would be paid to deliver Offer-funded childcare. The majority of childcare providers welcomed the direct and ongoing contact they had with their EILA Offer teams and found it an effective means of getting to know about the Offer.
- 6.8 Schools, and the education sector more generally, were less involved in the early communication process, even though the provision of foundation phase nursery education (FPN) forms at least 10 of the 30 hours of provision available each week through the Offer. The main reason for this was that FPN providers did not need to change any of their delivery approaches to accommodate the Offer. However, as a result of FPN providers not being engaged in the early development and implementation stages of the Offer to the same extent as childcare providers this did limit their awareness of and support for the Offer.

Parents

- 6.9 Most parents surveyed who had accessed the Offer became aware of the Childcare Offer through information passed on to them by their existing childcare providers. During the first year of implementation, the Offer was only available in selected wards in six of the seven EILAs. As a result, communication and promotional activities had to be targeted to specific areas. EILAs avoided authority-wide promotional campaigns as they did not want to mis-lead parents who were located in non-eligible wards. For the same reason, a national all-Wales promotional campaign could not be implemented during the first year. This placed further limitations on the potential reach of communication and promotional activities during the pilot phase. These limitations will diminish as the Offer is further rolled out and opportunities for national awareness campaigns to be launched.
- 6.10 Channelling information to parents through providers provided a means of targeting the promotion of the Offer to parents located in the eligible areas. This process worked well in most cases although ensuring accuracy of information was critical as ‘word of mouth’ was key for providers when communicating the Offer to parents. Promoting the Offer via childcare providers did however, limit the reach of the awareness raising process to some extent as the information provided was mostly passed on to parents who already accessed formal childcare. As a result, parents accessing informal childcare arrangements, as well as those accessing formal childcare from providers who had not signed up to deliver the Offer, were less likely to hear about it. This may be reflected in the fact that 94 per cent of survey responses noted that they had already accessed formal childcare before the Offer was introduced and 90 per cent had accessed childcare from their current provider.

Impact on the Childcare Sector

- 6.11 The introduction of the Childcare Offer in Wales has not, to date, prompted any major changes in providers’ delivery patterns. The majority of providers interviewed (90 per cent) reported that they had not yet changed any of their delivery approaches or extended their opening hours in response to the introduction of

Childcare Offer in Wales. Providers who had extended their operating hours were mainly sessional playgroups.

Change in demand for childcare

- 6.12 Over half of the providers interviewed noted no change in the number of children registered at their setting since the Offer was introduced. Of those who did record an increase in the number of children (40 per cent), two-thirds reported that this was due to the Offer. However, overall, two-thirds of the providers noted that they had witnessed an increase in the number of hours of childcare used by existing customers, and much of this had been influenced by the Offer.
- 6.13 Few providers noted any concerns about their capacity to accommodate the current demand for childcare places generated by the Offer, although many childminders did note that they were already operating at or near full capacity. Other providers noted that although they had capacity to accommodate more childcare places if required the prospect did not appeal as they feared expanding provision could adversely affect the character of their childcare setting.

Commercial viability

- 6.14 The majority of providers consider the payment rate of £4.50 an hour which they receive for delivering childcare funded by the Offer to be commercially viable. Almost three-quarters are of the view that delivering Offer-funded childcare has improved the profitability and sustainability of their business. Providers also welcome the timely and accurate manner in which they are paid by their local EILA and this further contributed to the sustainability of their setting. However, stakeholders and some providers commented on the importance of ensuring that the Offer hourly rate is regularly reviewed, rises in line with inflation and takes account of any sector-specific cost increases.
- 6.15 Hourly pay rates and an increase in the hours used by parents were not the only factors recognised as having an impact on profitability and sustainability. Providers noted that required staff ratios for childcare can also impact on commercial viability,

as well as the ability and willingness of providers to increase the number of children at their setting.

Delivery costs and charging structures

- 6.16 For the majority of providers (90 per cent) the delivery cost per child has not changed as a result of the Offer. Some providers (15 per cent) had introduced additional charges for food and transport and a minority (four per cent) had increased their fee rate for all parents as a result of the Offer. The methods and amounts of additional charges vary, although in some cases they have been introduced to ensure that delivering the Offer remains commercially viable. This may suggest the need for further guidance for providers on the introduction of additional fees.

Variation in charging structures

- 6.17 Providers charge parents for additional hours, over and above those funded through the Offer. There are some variations in the way providers charge for these additional hours, some charge for the additional hours used, while others charge on the basis of the childcare fees that remain once the value of the funding received through the Offer has been accounted for.

Who is accessing the Offer?

- 6.18 The annual gross salary of parents accessing the Offer range from below £15,000 to over £52,000. Most parents accessing the Offer fall into the mid to low income brackets. The median annual gross earnings of those accessing the Offer (£20,800 - £25,999) is comparable with the median annual gross earnings of the general population in Wales (£25,900). Sixty per cent of all parents accessing the Offer and 80 per cent of the lowest earners in households accessing the Offer earned the equivalent or less than the median population earnings in Wales.

Influence on the take-up of childcare

- 6.19 The introduction of the Childcare Offer has not yet led to substantial changes in the behaviour of parents in relation to accessing childcare. The majority (90 per cent) of parents accessing the Offer used the same childcare provider as they had done before accessing the Offer. Access to the Offer had encouraged 40 per cent of parents surveyed to access more hours of formal childcare.
- 6.20 Most parents surveyed (60 per cent) reported they used a combination of informal and formal childcare. The introduction of the Offer had encouraged 16 per cent of parents to use less informal childcare in favour of more formal childcare.

Take-up and delivery of foundation phase nursery education

- 6.21 The minimum of 10 hours of FPN provision and up to 20 hours of funded childcare provision available through the Offer, are often delivered in separate settings. The ability of children to access both strands of the Offer is therefore dependent on whether or not the child can access both settings. The evaluation findings outline a few examples of parents making a choice between accessing FPN or childcare. However, these decisions are not necessarily influenced by the Offer. The introduction of the Offer has however, highlighted some of the challenges that already exist for some parents in relation to accessing FPN and childcare provision.
- 6.22 Some non-maintained settings deliver FPN as well as formal childcare to rising threes. The rate at which some of these providers are paid to deliver FPN is often lower than the rate paid to deliver childcare funded by the Offer. This has led some providers to consider substituting FPN provision for Offer-funded childcare provision. However, no evidence has emerged during the early implementation phase of providers changing their provision in this way yet.

Welsh-medium provision

- 6.23 Most of the Welsh-medium childcare provision is delivered by *cylchoedd meithrin*. These are typically sessional day care settings operating for two to three hours a day. Concerns were voiced prior to the launch of the Offer that parents accessing Welsh-medium provision at these settings would move to other settings that offered more hours of childcare per day – but possibly not Welsh-medium provision. Evidence gathered during the early implementation stage suggest that there has been very little if any movement of this nature.

Access to holiday provision

- 6.24 Parents who are eligible for the Offer can access 30 hours of funded childcare during nine of the thirteen weeks of school holidays (as opposed to a combination of FPN and childcare as is the case during school terms). Some concerns were raised at the outset that this could lead to a situation where demand for childcare during school holidays would exceed the provision available. However, fewer parents accessed childcare during the school holiday periods than was initially anticipated. As such concerns about over demand for childcare during school holidays have not surfaced to date. However, seven of the 32 parents interviewed at length noted they were unable to access the childcare provision they required during school holidays.

Special Educational Needs (SEN) provision

- 6.25 Each EILA was allocated with a budget ringfenced for the provision of SEN support to children accessing the Offer. However, there has been relatively low use of this budget during the early implementation stage. Reasons for this include an uncertainty among EILAs as to how the budget should be used. Those who have used the budget have done so to support activities such as one-to-one, specialist advice, training as well as 'backfilling' to facilitate staff training sessions for childcare providers.

Impact of the Offer on employment prospects

- 6.26 The Childcare Offer in Wales has led to some positive, but not significant, impact on the employment prospects of parents supported by it. This is in line with what would be expected during the early implementation period.
- 6.27 The majority (86 per cent) of parents surveyed reported that they currently work the same number of hours as before the Offer. However, 10 per cent noted that they work more hours; 67 per cent reported having more flexibility in the types of jobs they do and the hours they work; and 60 per cent reported having more opportunities for training. Those who did report improved employability as a result of accessing the Offer were mostly women and parents from lower household earnings groups as categorised within the survey findings.

Impact of the Offer on disposable income

- 6.28 The majority (88 per cent) of surveyed parents reported having more disposable income as a result of accessing the Offer. This was mainly as a result of the reduced childcare costs they now incurred. However, 67 per cent of surveyed parents reported that the Offer gave them more opportunities to increase their future earnings.

7. Recommendations

7.1 The following recommendations are informed by findings that have emerged from the evaluation of the first year of the early implementation of the Childcare Offer in Wales. They outline key areas that the evaluation considers could be further strengthened during the next implementation phase of the Offer.

- Further consideration should be given to ensuring that application processes are as straightforward as possible for all parents. This would include ensuring that self-employed individuals, contract workers and those on zero-hour contracts can demonstrate proof of employment, and therefore access the Offer, as easily as parents in other forms of employment.
- As we move closer to national rollout a more centralised approach to promoting and raising awareness of the Offer should be considered. This could be linked to further information relating to the eligibility criteria for parents and their access to funded childcare during school holidays.
- More and clearer information may be needed to help parents work out childcare costs taking into account support provided through tax credits, Universal Credit and Tax-Free Childcare.
- Consider further alignment between the provision of childcare and the delivery of FPN in relation to access for parents and funding arrangements. This could include co-location but could also include transport to and from settings as well as the joint provision of other wraparound childcare arrangements.
- Linked to the recommendation above, closer working relationships may be required between schools delivering FPN and Childcare providers.
- Further guidance to providers may be required to ensure a consistent approach to charging for additional hours across all childcare settings delivering the Offer.

- Take-up of business support among childcare providers appears to have been low during the first year of early implementation. Further promotion of the support already available to providers should therefore be considered.
- Further guidance to EILAs may be required regarding the use of the SEN budget available through the Offer.
- Further research is needed over a longer period of time, in order to provide conclusive evidence on impact. The feasibility of linking to government administrative data records (e.g. HMRC employment records) to support this evidence gathering should be explored further.
- Individual EILAs have produced a large quantity of good quality monitoring data. In order to fully utilise this data during further monitoring and evaluation of the Offer, further considerations may be required to ensure that this data is presented and recorded in consistent manner across all EILAs.

Further and more detailed recommendations are given in the evaluation thematic reports.

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Annex A: The Childcare Offer compared

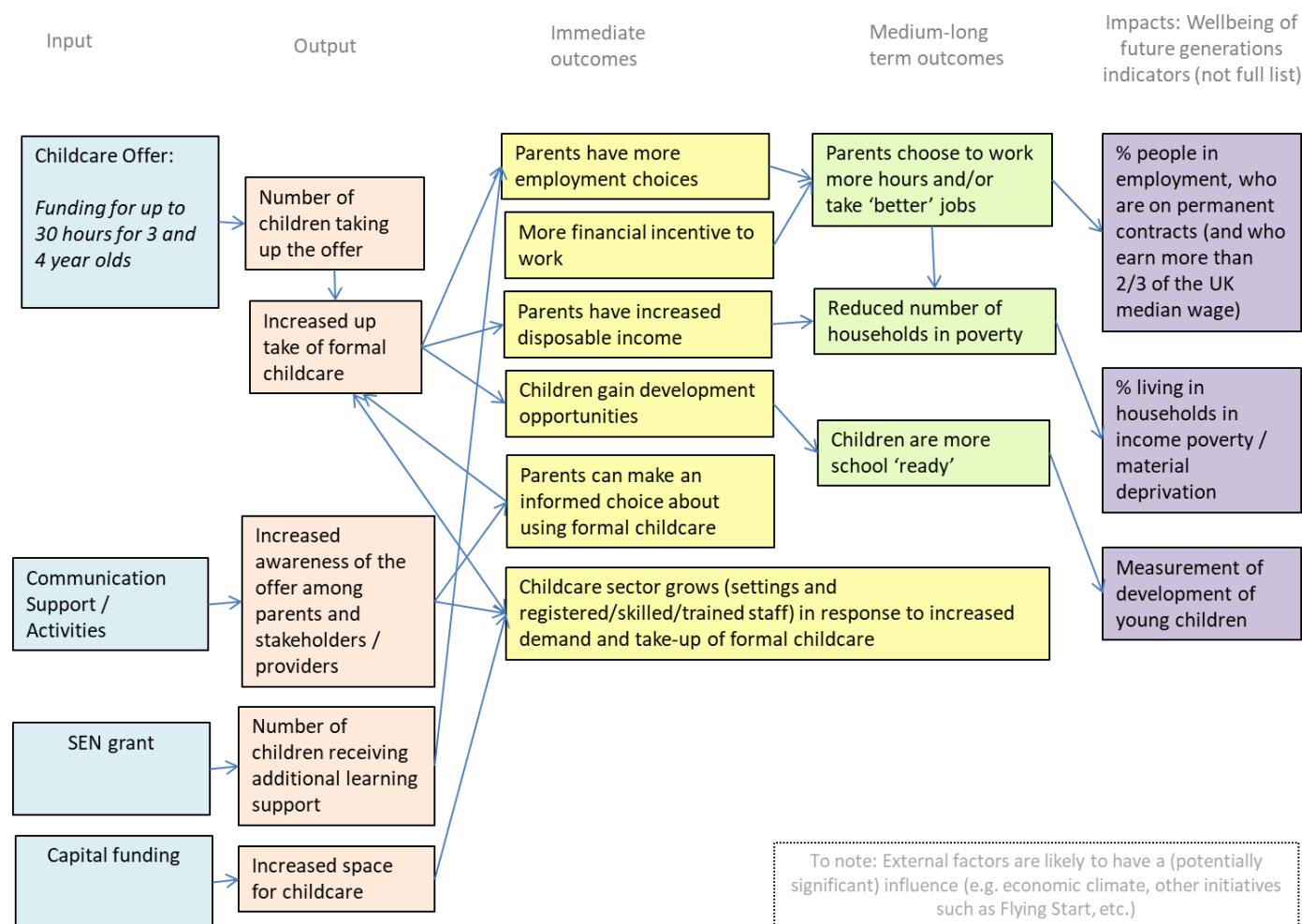
	Wales	England	Scotland
Start date of Childcare Offer pilot	September 2017	September 2016	August 2014 - 600 hours; was previously 475 hours per year.
Start date of Childcare Offer full roll-out	September 2020	September 2017	
What is the Childcare Offer?	The Childcare Offer for Wales will provide eligible working parents with 30 hours childcare for 3-4-year-olds only.	All 3 to 4-year-olds in England can get 570 free hours per year. It is usually taken as 15 hours a week for 38 weeks of the year.	Up to 600 hours of funded early learning and childcare a year (around 16 hours a week in term time). By 2020 they will increase the hours of free ELC from 600 to 1,140 hours per year. In addition, including eligible two-year-olds (based on free school meal entitlement criteria) by the end of the next Parliament.
How many hours of childcare and FPN are there? <ul style="list-style-type: none"> Total hours per week / weeks per year available – term time and holidays. Where and when can the childcare be taken? 	<p>The 30 hours Offer will be a combination of Foundation Phase Nursery (FPN) (usually between 10 – 12.5 hours) and childcare (usually between 17.5 – 20 hours), for up to 48 weeks per year.</p> <p>Foundation Phase Nursery Provision is available in term time.</p> <p>For this year of the pilots, parents can access the Offer at any point they wish. However, it is the responsibility of the parent to find childcare</p>	<p>The 30 hours is based on a school term-time schedule, rather than a working parent schedule. Therefore, the Offer is for 30 hours free per week for 38 weeks per year.</p> <p>This totals 1,140 free hours across the year - or approximately 22 free hours per week across 52 weeks.</p> <p>The hours over which funded provision can be taken were extended from 7am-7pm to 6am-8pm</p>	<p>600 hours per year. This equates to 16 hours a week during school term-time of free childcare. The funded 600 hours must be taken over a minimum of 38 weeks. If the child attends nursery for less than 38 weeks across the year the funded entitlement will apply on a pro rata basis.</p> <p>A Local Authority Early Learning and Childcare place is 5 morning or 5 afternoon sessions per week, with</p>

	providers who can accommodate their requirements.	in November 2016, to allow parents to drop off their children earlier in the day and collect them later in the evening. There would continue to be a maximum of 10 hours of funded provision in one day.	each session being 3 hours and 10 minutes.
When can parents access the Offer?	Eligible children will be able to access the Childcare Offer from the term after their 3rd birthday, until they enter full-time education.	The Offer is available from the term after the child's 3 rd birthday.	Eligible for 4-6 terms dependant on the child's birthday within the school year. Eligible the term after their 3 rd birthday.
Who is eligible for the Offer?	Eligible working parents need to be earning the equivalent of 16 hours a week at the national minimum wage, national living wage or more. If part of a couple, both parents must be working and meet this requirement. An upper income cap for working parents is set at £100,000, each.	Both partners must each expect to earn (on average) at least £125 per week. Parents cannot get 30 hours free childcare if either partner individually expect to earn £100,000 or more.	All children aged 3 and 4, and some children aged 2 years old currently have an entitlement to 600 hours of Early Learning and Childcare. In some areas, e.g. Glasgow, the hours have increased to 900 as of August 2018, but this is not eligible for all children, only those with working families. The 900 hours is also capped to families annually earning £30,000 or less.
Can parents use more than one childcare provider?	Parents can use up to two registered childcare settings per day in addition to their nursery education setting in any given day during term time. Parents can only use two registered childcare settings during school holidays.	Parents can split their funded entitlement between more than one provider, though no more than two sites in one day.	If a child has a funded early learning and childcare place for 600 hours, this may be a part-time place each day during school term-time. Other options, such as longer places for fewer days, or places during school holidays are also available. These options vary by council. The options available vary across the

			country but may include: <ul style="list-style-type: none"> • part-day places in a morning or afternoon • full-day places • places split across more than one setting, for example a school nursery and a private nursery, and other different options.
How much childcare can parents access during school holidays?	Eligible parents will be able to access 30 hours of childcare during school holidays for the remaining 9 weeks of the year.	None, the Offer is only available for 38 weeks per year which equates to school term time.	There are 44 chargeable weeks for full a year's provision i.e. 52 weeks minus 8 weeks when charges are not applied. The 8-week deduction includes 4 weeks for public holidays and in-service days, 3 weeks considered as "payment holiday" weeks and one week's allowance for days when the nursery is unavailable due to unforeseen circumstances (e.g. adverse weather) when parents will not be charged for service provision. Both the "payment holiday" (irrespective of when holidays are actually taken) and the one-week allowance for days when the service is unavailable is automatically deducted from bills.
Can parents choose any childcare provider?	Yes, as long as the provider is willing to be part of the Offer and they are registered with CIW.	Available at participating full day care, schools, childminders, sessional providers, children centres and after-school clubs. Approved Ofsted	Not all childcare services offer funded early learning and childcare places. Local authorities are in charge of commissioning places and providers

		providers only.	must work in partnership with them. All early learning and childcare providers have to register with the Care Inspectorate. The Care Inspectorate looks at how early learning and childcare services support the health and wellbeing of children. Education Scotland is responsible for inspecting the quality of educational provision.
Will parents have to pay for anything?	The funding from the government is for the education and care the professionals within the setting provide. It does not include food, transport or off-site activities that incur an extra charge and providers can charge for these. The cost of transport depends on and how far they have to travel. Providers should not charge more than £7.50 per day for food or £4.75 for half a day.	The 30 hours free childcare offer is not intended to cover the costs of meals, additional hours or additional activities. Providers may charge a fee for these additions. If parents choose to pay for these it is an arrangement between the parent and the childcare provider. However, parents must not be required to pay any fee as a condition of taking up 30 hours place, and must be offered alternative options.	The Early Learning and Childcare place is free of charge but there is a small charge for snack.

Annex B: Childcare Offer for Wales Logic Model



Source: Welsh Government, dated April 2018.

Annex C: Childcare Offer for Wales – pilot areas.⁴⁸

The Welsh Government began piloting the Offer in September 2017 in:

- **Anglesey** - Menai Bridge, Llandegfan, Llanfairpwll, Beaumaris and Llangoed; the villages of Niwbwrch, Dwyran, Brynsiencyn, Llangaffo, Llanddaniel and Llanedwen; and the town of Llangefni and Talwrn.
- **Gwynedd** - the well-being area of Bangor which includes Bethesda; the well-being area of Porthmadog which also includes Criccieth, Penrhyndeudraeth, Harlech and Garndolbenmaen; the well-being area of Ffestiniog which includes areas down to Trawsfynydd; and the well-being area of Dolgellau which includes the area around Barmouth, Corris, Dinas Mawddwy, Dyffryn Ardudwy and Llanbedr. From January 2018, the well-being area of Caernarfon which includes Bethel, Cwm y Glo, Bontnewydd, Deiniolen, Llanberis, Groeslon, Llanllyfni, Clynog, Llanrug, Llanwnda, Penisarwaen, Penygroes, Talysarn and Waunfawr also tested the Offer.
- **Blaenau Gwent** implemented the Offer across the whole local authority.
- **Caerphilly** tested the Offer in the Mid-Valleys East region which incorporates urban areas such as Blackwood, Newbridge and Crumlin as well as a number of smaller communities.
- **Flintshire** tested the Offer in Buckley, Bagillt and Broughton, and within areas of Aston, Connahs Quay (Central and Golftyn), Garden City, Greenfield, Higher Shotton, Holywell (Central), Mancot, Queensferry and Sandycroft.
- **Rhondda Cynon Taf** tested the Offer in four school catchment areas spread across the three valleys and one Welsh-medium catchment area to ensure an even spread across the authority. These are Ysgol Gyfun Rhydywaun, Bryncelynog, Ferndale and Mountain Ash school catchments.
- **Swansea** tested the Offer in wards spread across the city including Dunvant, Penclawdd, Llangyfelach, West Cross, Morriston, Pontarddulais and Gorseinon.

From December 2017 the following wards were added:

- **Flintshire:** Wards of Connah's Quay South, Connah's Quay, Wepre, Flint Castle, Flint Coleshill, Flint Oakenholt, Flint Trelawny, Holywell East, Holywell West, Saltney Mold.
- **Gwynedd:** The well-being area of Caernarfon. Includes following wards; Bethel, Bontnewydd, Cadnant, Clwt y Bont, Cwm y Glo, Deiniolen, Groeslon, Llanberis,

⁴⁸ Welsh Government (2017) *New areas to pilot Welsh Government's free childcare offer*. Available at: <http://gov.wales/newsroom/people-and-communities/2017/171215childcare/?lang=en>

Llandwrog, Llanllyfni, Llanrug, Llanwnda, Menai (Caernarfon), Peblig (Caernarfon), Penisa'r waun, Pen-y-groes, Seiont, Talysarn, Waunfawr, Clynnog.

From January 2018 additional wards also delivered the Offer:

- **Anglesey:** Valley 2, Trearddur 1 and 2, Llanfihangel Esceifiog, Brynteg, Llanbedrgoch, Pentraeth, Amlwch rural, Bodorgan, Llanfair yn Neubwl 1 and 2, Aberffraw and Rhosneigr 1, Parc ar Mynydd, Llaneilian, Moelfre, Llanfaethlu, Mechell.
- **Gwynedd:** Well-being area of Penllyn, which includes Bala, Llandderfel, and Llanuwchllyn.
- **Caerphilly:** Wellbeing Area of Caerphilly Basin wards: Aber Valley; Bedwas; Trethomas; Machen; Llanbradach; Morgan Jones; Penyrheol; St James; and St Martins; Lower Islwyn, wards: Abercarn; Crosskeys; Risca East; Risca West; and Ynysddu.
- **Rhondda Cynon Taf:** Wards of Ynyshir and Pontyclun.
- **Flintshire:** Wards of Hope, Caergwrle and Higher Kinnerton.
- **Swansea:** The wards of Gowerton; Penllergaer; Llansamlet; Penderry; Kingsbridge; Upper Loughor; Lower Loughor; Penyrheol; and Cockett.

Annex D: Organisations consulted during the evaluation

Care Inspectorate Wales

Children in Wales

Children's Commissioner for Wales

Chwarae Teg

Clybiau Plant Cymru

Early Years Wales (previously called Wales Pre-school Providers Association)

EILA Childcare Offer teams

Estyn

Future Generations Commissioner for Wales

Mudiad Meithrin

NDNA (National Day Nurseries Association)

PACEY (Professional Association for Childcare and Early Years)

Play Wales

Social Care Wales

Welsh Government (officials from the Childcare Offer, Foundation Phase, Enterprise and Parents Childcare and Employment (PaCE) teams)

WLGA (Welsh Local Government Association)

Annex E: Topic guide for Childcare providers

Background information

1. What type of childcare setting do you have?

Childminder	
Daycare: Full day care (day care provided for a continuous period of 4 or more hours in any day, in nondomestic premises, e.g. day nurseries, children's centres)	
Daycare: Sessional day care (childcare which is for less than a continuous period of 4 hours in any one day, e.g. Playgroups, Cylchoedd Meithrin)	
Out of School Childcare – childcare for more than two hours in any day outside of the child's full-time school day and includes before school, after school <i>and during the school holidays</i> .	
Other childcare provider / not sure – please explain.	

2. How many children are cared for at your setting per day?

Total number of children	
Total number aged 3 to 4	
Total number under 3 years of age	
Total number over 4 years of age	
Total number of children supported through the Childcare Offer	

3. What are your opening hours?

Morning only – before 1pm		
Afternoon only – after 1pm		
Short day (9.am to 3 pm)		
Extended day (i.e. before 9 am until after 3 pm)		Go to q (a)
Wrap around only (e.g. before 9 or after 3)		
Other please specify		

(a) If extended day is this:

Continuous opening i.e. from before 9 am until after 3 pm	
Non-Continuous i.e. open before 9 am or after 3 pm but closed at some point in the day	
Other please specify	

4. Have you extended your opening hours following the introduction of the childcare offer in September 2017?

Yes		If yes go to (a) and then (b)
No		Skip (a) and (b)
D/K		Skip (a) and (b)

(a) If 'Yes' in what way? Do you now open:

Earlier in the day	
Over lunch time	
Later in the day	
At the weekend	
More weekdays	
During school holidays	

Communication

5. How did you hear about the childcare offer?

Family Information Services	
The local authority	
Through the media (e.g. local newspaper – radio)	
Through local primary school	
From another childcare provider	
From a parent	
Other (please specify)	

- How much information did you receive about the offer? How was it provided to you?
- Was this information clear enough - detailed enough?
- Had you heard of the campaign TalkChildcare?

6. What appealed to you about the offer?

- Was there anything about the offer that concerned you?

7. What has worked well in relation to on-going communication and support you receive from the local authority? What could be improved?

8. Did you promote the offer to parents?

- If **'yes'** - How did you do this – e.g. word of mouth; posters; meetings?
- What worked well – what was challenging?
- Did you target your promotion specifically on parents from within the pilot area – or did you target all parents? [possible prompts: how did parents react – how did parents who were outside the pilot area react?]
- If **'no'** – why not [please provide details]

Design and implementation

9. What worked well and what was challenging about the process of registering to deliver the 30 hours of childcare?
- Prompt about - Accessing the relevant information and application / SLA forms?
10. Did the application process ask you about your ability to cater for the Welsh language needs of the children? How were you able to address that?
11. Did the application process ask about your ability to cater for children with Special Education Needs (SEN)? How were you able to address that?

Influence on delivery

12. Compared to the number of children you had at your setting in 2016 / early 2017, has the number of children you have at your setting:

Increased	
Stayed the same	
Decreased	

13. To what extent do you think any of these changes have been influenced by the childcare offer?

Totally influenced by the Offer	
Influenced to some extent by the Offer	
The Offer has had no influence	

14. Have you noticed an increase in demand for places / hours of care at your setting since September compared to previous years?

- if **'yes'** has this been driven by parents taking up the childcare offer?
- If **'no'** – has the introduction of the childcare offer had any impact on demand for childcare at your setting?

15. Are the parents, who are accessing childcare through the Offer, new customers of yours? How many children at your setting, who are funded through the Childcare Offer, are:

	Number of children
Brand new family	
New child place but existing / previous relationship with parents e.g. older sibling attended	
Child started at the setting before September 2017	
Other please specify	

- If they are new customers do you know where they accessed childcare from before?

16. Are there any obvious differences in the number of hours of childcare taken up by childcare offer families and non-childcare offer families?

- Have parents, who already had their child(ren) at your setting and who now access childcare through the offer, increased the number of hours of childcare that they take up?

17. Do childcare offer parents tend to take up the full (up to) 20 hours?

All	
Most	
Some	
None	

- Ask for actual numbers and more detail on range of hours.

18. Do childcare offer parents use all the childcare hours that they book?

- Do parents tend to leave their child at the setting for fewer hours than they applied for funded through the offer?

19. Do childcare offer parents access more hours than those funded through the offer?

All	
Most	
Some	
None	

20. Can parents freely choose what days / times and number of hours their child attends? (Probe for whether there is a requirement for using hours in addition to the 20 or so childcare offer hours)

21. Are you aware of any of your customers / parents, who are eligible for the offer who have decided not to take it up?

- If yes do you know why they may not have taken it up?
- Explore options to share contact details.

Business changes

22. Are you funded to deliver Foundation Phase at your setting?

Yes	
No	

23. Are you considering any changes to your mix of Foundation Phase and childcare provision as a result of the Childcare Offer (or starting to deliver Foundation Phase)? Why?

24. Do you know of any parents who haven't taken up the free childcare offer at your setting because they wanted to access the Foundation Phase elsewhere? Do you know why?

25. Do you know of any parents who haven't taken up their Foundation Phase hours elsewhere because they want to access the free childcare offer at your setting? Do you know why?

26. Has there been a change in the level of demand for specific types of provision (e.g. Welsh language / SEN provision amongst parents accessing the offer?

- If yes – how has your setting responded to this change in demand?

27. Have you, or are you planning to change the focus of some, or all of your childcare provision?

- Changes in hours or numbers of places;
- foundation phase nursery provision;
- pre-school nursery children (3 or 4-year-olds) and less provision for younger or older children;
- flexibility in delivery hours;
- wrap around transfers to and from foundation phase / nursery provided in other settings;
- Welsh-medium provision;
- Provision aimed at children with SEN.
- If you do plan delivery changes – to what extent have these / will these have been influenced by the childcare offer?

28. Did you / have you formed any new partnerships with other providers to deliver the offer? If yes, was this partnership with:

A private childcare provider	
A school nursery class	
Primary school	
Childminder	
Holiday play-scheme provider	
Other please specify	

29. Do you provide any childcare places supported through Flying Start? [Only ask if in Flying Start area]

- If yes have any children in your care setting transferred from Flying Start to the 30-hour childcare offer? Has this transition been smooth or challenging?

Sustainability

30. Has the childcare offer had a positive or negative effect on the profitability and sustainability of your business?

	Profitability	Sustainability
Positive effect		
Negative effect		
No effect		

31. Is the payment of £4.50 / hour to provide childcare through the Offer a commercially viable option for you?

Yes	
No	
Don't know	

- Please provide explanation to support your answer.
- What does the £4.50 cover for you as a provider? (Probe - How much goes towards wages, building rents, maintenance, training etc. Note also if the answer is don't know)

32. Are the payments you receive for delivering the childcare offer places delivered to you in a timely and accurate manner?

- Do you receive payments in advance or in arrears of the delivery?
- Explore any issues with payment systems/methods.

33. Have you introduced additional charges since September 2017?

Yes, directly due to the 30 hour childcare offer		
Yes, but not due to the 30 hour childcare offer		
No have not introduced any additional charges		
Other please specify		

- If Yes, what are these additional charges for?

Meals	
Other consumables e.g. equipment, music lessons, trips etc	
Registration and administration costs	
Other please specify	

- If Yes, what is the scale of these charges?

34. Have you increased the rate/cost for childcare?

Yes, directly due to the 30 hour childcare offer		
Yes, but not due to the 30 hour childcare offer		
No have not introduced any additional charges		
Other please specify		

- If Yes, what is the scale of these charges?

35. Has the delivery cost per child for your business / setting increased as a result of the 30-hour childcare offer?

Increased	
No change	
Decreased	

- Prompt for more details

36. Have there been any changes in the hourly staff pay due to any extended hours?

Increased	
No change	
Decreased	

- Prompt for more details

37. Do you have the capacity (space, access to skilled staff) that you need to meet any increase in demand generated by the offer?

- If no what capacity challenges are you facing / do you envisage?

38. Do you anticipate an increase in demand for childcare places during school holidays as a result of the offer?

- **If yes** will you be able to meet this demand? If not, what are the implications of this? What additional resources / actions do you need to consider in order to meet this increase in demand?

39. Will you be able to (i) retain and (ii) to recruit any additional staff you may need to deliver any additional childcare that is generated from the introduction of the offer?

- What (if any) are the staff retention and recruitment opportunities and challenges you envisage facing as a result of the offer?

40. Have you received any business support to help you plan your business linked to the childcare offer?

Yes	
No	
D/K	

- **If yes**, from where (the local authority; Business Wales, Childcare organisation e.g. NDNA, Mudiad, Pacey) and can you explain the topic and nature of the support.
- Is there any aspect of childcare as a business you would like (further) support with?

Counterfactual

41. Would your current delivery plans be different if you were not delivering childcare funded places through the offer? If so, in what way? If not, why not?

Lessons

42. What advice would you share with providers in those areas of Wales where the Childcare Offer is being rolled out?

Annex F: Online survey for participating parents

Parent Survey Web Questionnaire

Notes on the questionnaire

- This questionnaire is for a survey of parents taking up the Childcare Offer.
- *Questionnaire length* for this survey should be no longer than 15 minutes online.

Multicode questions are marked as 'MULTICODE: GLOBAL SELECT ALL'. Please display the respondent instruction: (Please select all that apply)

Single coded questions are marked as 'SINGLE CODE. GLOBAL SELECT ONE.' A respondent instruction is not required.

Don't Know and Refused options

- Where 'Don't know' and 'Refused' are specified they should be visible answer codes
- Where only 'Don't know' is specified, and 'Refused' is not specified, only 'Don't know' should be visible (and vice versa)
- Where DK/REF are not specified they should be included as hidden options
- Where DK/REF are not to be included as answer codes, this is specified

Question headers

e.g. **Section 1. Introduction** do not require programming

Authenticate page

Needs to be displayed in English and in Welsh

Question inserts – there is one question insert in this questionnaire.

#Prov is linked to answers to the multicoded question **Prov**. The answer codes at Prov are very long, so they need to be shortened for question inserts as follows:

- 1) Nursery school – use “nursery school” as question insert
- 2) Nursery class – “nursery class”
- 3) Out of School Childcare – “out of school childcare”
- 4) Day nursery – “day nursery”
- 5) Welsh-medium playgroup (Cylch meithrin) - use Welsh-medium playgroup
- 6) Other playgroup or pre-school – “pre-school”
- 7) Childminder – “childminder”
- 8) Other childcare provider – “other type of childcare provider”

Section 1. Introduction

Add Landing Screen text for access code page:

Childcare Offer for Wales: Parents Survey

Please enter your access code. You can find your access code on the email and letter we sent you.

Rhowch eich cod mynediad. Gallwch weld eich cod mynediad ar yr e-bost a llythyr a anfonom atoch.

ChkLang {ASK ALL}

Please select language:

Dewiswch iaith:

ANALYSIS: "language"

SINGLE CODE. GLOBAL SELECT ONE.

1- English / Saesneg

2- Welsh / Cymraeg

[Don't knows/refusals not allowed]

1IntroA {ASK ALL}

The Welsh Government has commissioned NatCen Social Research to gather the views of working parents, like you, who are eligible to receive the free early education and childcare offer for 3 and 4 year olds under the new **Childcare Offer for Wales**. What you tell us will help improve how this new offer works for parents across Wales.

The questionnaire will take approximately 15 minutes to complete.

All your answers will be kept confidential and you won't be identified in any reporting of this survey.

*Mae Llywodraeth Cymru wedi comisiynu NatCen Social Research i gasglu barn rhieni sy'n gweithio, fel chi, sy'n gymwys i dderbyn y cynnig addysg gynnar a gofal plant am ddim ar gyfer plant 3 a 4 oed dan y **Cynnig Gofal Plant Cymru** newydd. Bydd yr hyn a ddywedwch wrthym yn helpu gwella sut mae'r cynnig newydd yn gweithio i rieni ar draws Cymru.*

Bydd yr holiadur yn cymryd oddeutu 15 munud i'w gwblhau.

Bydd eich atebion i gyd yn gwbl gyfrinachol ac ni fyddwch yn cael eich adnabod mewn unrhyw adroddiadau ar yr arolwg hwn.

Section 2. Respondent and child check, household composition

ChFour {ASK ALL}

How many children **aged 4 and under** do you have, who live with you?

*Faint o blant **4 oed neu iau** sydd gennych chi, sy'n byw gyda chi?*

ANALYSIS: "Number of children aged 4 and under"

SINGLE CODE. GLOBAL SELECT ONE.

1- 1 child aged 4 or under

2- 2 children aged 4 or under

3- 3 or more children aged 4 or under

4- I do not have any children aged 4 or under

5- 1 plentyn 4 oed neu'n iau

6- 2 o blant 4 oed neu'n iau

7- 3 neu fwy o blant 4 oed neu'n iau

8- Does gen i ddim plant sy'n 4 oed neu'n iau

SOFT: IF ChFour=4 "This study is about the free early education and childcare offer for eligible working parents of **3 and 4 year olds**"

You reported that you do **not** have any children aged 4 or under. If this is correct, select Next, otherwise please amend your answer."

*"Mae'r astudiaeth yma ynghylch y cynnig addysg gynnar a gofal plant am ddim ar gyfer rhieni mewn gwaith cymwys i **blant 3 a 4 oed**"*

*Rydych wedi adrodd **nad** oes gennych unrhyw blant sy'n 4 oed neu'n iau. Os yw hyn yn gywir, dewiswch Nesaf, fel arall newidiwch eich ateb."*

FreeHrsChck {ASK IF ChFour = 1,2,3,DK,RF}

This study is about the free early education and childcare offer for 3 and 4 year olds of working families in Wales.

Do you currently use, or are you planning on using, any free hours of early education or childcare for any 3 or 4 year olds in your family under this new offer?

Mae'r astudiaeth yma ynghylch y cynnig addysg gynnar a gofal plant am ddim ar gyfer plant 3 a 4 oed teuluoedd mewn gwaith yng Nghymru.

A ydych chi'n defnyddio ar hyn o bryd, neu a ydych chi'n bwriadu defnyddio, unrhyw oriau addysg gynnar neu ofal plant am ddim ar gyfer unrhyw blant 3 neu 4 oed yn eich teulu dan y cynnig newydd hwn?

ANALYSIS: "Whether using/planning to use free hours of early education and childcare"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes, currently using the free hours
 - 2- Yes, planning to use the free hours but have not started yet
 - 3- No, not currently using or planning to use the free hours
- [DKs/refusals not allowed]

- 1- Ydw, yn defnyddio oriau am ddim ar hyn o bryd
- 2- Ydw, yn bwriadu defnyddio'r oriau am ddim ond heb gychwyn eto
- 3- Na, ddim yn defnyddio'r oriau am ddim ar hyn o bryd, na'n bwriadu gwneud

[DKs/refusals not allowed]

SOFT: IF FreeHrsChck=2, 3 "This study is about the 30 hours of free early education and childcare for working parents of **3 and 4 year olds**. You have indicated that you are not currently using the free hours of early education and childcare.

If this is correct, select Next, otherwise please amend your answer."

"

*Mae'r astudiaeth yma ynghylch y 30 awr o addysg gynnar a gofal plant am ddim ar gyfer rheini mewn gwaith gyda **phlant 3 a 4 oed**. Rydych wedi dynodi nad ydych yn defnyddio'r oriau am ddim o addysg gynnar a gofal plant ar hyn o bryd na'n bwriadu defnyddio'r oriau am ddim.*

Os yw hyn yn gywir, dewiswch Nesaf, fel arall newidiwch eich ateb."

WhenStart {ASK IF FreeHrsChck = 1}

In which month did you start receiving the free hours of early education and childcare for 3 and 4 year olds under the new **Childcare Offer for Wales**?

*Ym mha fis wnaethoch chi ddechrau derbyn yr oriau am ddim o addysg gynnar a gofal plant ar gyfer plant 3 a 4 oed dan y **Cynnig Gofal Plant Cymru** newydd?*

ANALYSIS: "When started receiving the free hours of early education and childcare"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- September 2017
- 2- October 2017
- 3- November 2017
- 4- December 2017
- 5- January 2018 or later
- 6- Have not started yet

- 1- Medi 2017
- 2- Hydref 2017
- 3- Tachwedd 2017
- 4- Rhagfyr 2017
- 5- Ionawr 2018 neu'n hwyrach
- 6- Heb ddechrau eto

ThankyouA {ASK IF ChFour = 4 OR FreeHrsChck=2, 3 OR WhenStart=6}

"Thank you for your time but for this research we only need those parents who are using the free hours of early education and childcare offer for their 3 or 4 year old children.

Best wishes,
NatCen Social Research"

"Diolch i chi am eich amser, ond ar gyfer yr ymchwil yma dim ond y rheini hynny sy'n defnyddio'r cynnig oriau addysg gynnar neu ofal plant am ddim ar gyfer eu plant 3 neu 4 oed sydd eu hangen.

*Dymuniadau gorau,
NatCen Social Research"*

[COMPUTE NC OUTCOME 789]

ChildFocus2 {ASK IF FreeHrsChck =1 (yes)}

For the rest of the questionnaire we will be asking you about the child who is receiving the free hours of early education and childcare under the new Childcare Offer for Wales. If you have more than one child receiving the free hours, we would like to ask you about the child who is the oldest.

1 – Okay

[IF RESPONDENT TRIES TO SKIP WITHOUT CHECKING BOX: "Please tick the box and click next to continue"

[DK/RF NO ALLOWED]

Ar gyfer gweddill yr holiadur, byddwn yn eich holi am y plentyn sy'n derbyn yr oriau am ddim o addysg gynnar a gofal plant dan y Cynnig Gofal Plant Cymru newydd. Os oes gennych chi fwy nag un plentyn yn derbyn yr oriau am ddim, hoffem ofyn i chi ynghylch y plentyn hynaf.

1 – lawn

[IF RESPONDENT TRIES TO SKIP WITHOUT CHECKING BOX: Ticiwch y blwch a chliciwch nesaf i barhau]

Chk {ASK IF FreeHrsChck =1 (yes)}

Do you have main or shared responsibility for making decisions about the early education and childcare for this child?

A oes gennych chi brif gyfrifoldeb neu gyfrifoldeb a rennir dros wneud penderfyniadau ynghylch addysg gynnar a gofal plant ar gyfer y plentyn hwn?

ANALYSIS: "Responsibility for early education and childcare decisions"

SINGLE CODE. GLOBAL SELECT ONE.

1- Yes, I have main or shared responsibility for decisions about this child's early education and childcare

2- No, someone else is responsible for decisions about this child's early education and childcare

[Don't know/refusals not allowed]

1- Oes, mae gen i brif gyfrifoldeb neu gyfrifoldeb a rennir dros benderfyniadau ynghylch addysg gynnar a gofal plant y plentyn hwn

*2- Nac oes, rhywun arall sy'n gyfrifol am benderfyniadau ynghylch addysg gynnar a gofal plant y plentyn hwn
[Ni chaniateir ddim yn gwybod/gwrthod]*

BirthYear {ASK IF Chk=1}

In which year was your child born?

Ym mha flwyddyn y ganed eich plentyn?

ANALYSIS: "Child's year of birth"

SINGLE CODE. GLOBAL SELECT ONE.

1 – 2013

2 – 2014

3 – 2015

BirthMonth {ASK IF Chk=1 AND BirthYear = 1,2}
And in which month that year was your child born?

Ac ym mha fis o'r flwyddyn honno y ganed eich plentyn?

ANALYSIS: "Child's month of birth"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- January
- 2- February
- 3- March
- 4- April
- 5- May
- 6- June
- 7- July
- 8- August
- 9- September
- 10- October
- 11- November
- 12- December

- 1- Ionawr
- 2- Chwefror
- 3- Mawrth
- 4- Ebrill
- 5- Mai
- 6- Mehefin
- 7- Gorffennaf
- 8- Awst
- 9- Medi
- 10- Hydref
- 11- Tachwedd
- 12- Rhagfyr

SEN {ASK IF Chk=1}

Does your child have any special educational needs (SEN)? This includes learning difficulties or disabilities that make it harder for them to learn and which calls for special educational provision to be made.

A oes gan eich plentyn unrhyw anghenion addysgol arbennig (AAA)? Mae hyn yn cynnwys anawsterau dysgu neu anableddau sy'n ei gwneud yn anoddach iddo neu iddi ddysgu ac sy'n galw am ddarpariaeth addysgol arbennig.

ANALYSIS: "Whether child has SEN"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes
- 2- No

- 1- Oes
- 2- Nac oes

2ThankyouB {{ASK IF FreeHrsChck =1 (yes) AND Chk=2(no)}}

Thank you for your time but this research is only with those parents who have main or shared responsibility for their child's early education and childcare.

Diolch i chi am eich amser, ond mae'r ymchwiliad yma ar gyfer rhieni sydd â phrif gyfrifoldeb neu gyfrifoldeb a rennir dros addysg gynnar a gofal plant eu plentyn.

[COMPUTE NC OUTCOME 789]

Section 3. Current early education and childcare use

Prov {ASK IF Chk=yes}

The next few questions are about your use of early education and childcare in a typical week during this school term, so from this April 2018.

Which of the following formal early education and childcare providers does your child go to during a typical term-time week? Please think of all formal early education and childcare providers, including those you pay for and those that you receive free hours from.

Unsure what type of provider you use? No problem, you can look it up here:

[Childcare provider lookup](#)

Mae'r cwestiynau nesaf yn trafod eich defnydd o addysg gynnar a gofal plant mewn wythnos arferol yn ystod y tymor ysgol hwn, felly o fis Ebrill 2018.

Pa rai o'r darparwyr addysg gynnar a gofal plant mae eich plentyn yn mynd iddynt yn ystod wythnos arferol yn ystod y tymor? Meddyliwch am yr holl ddarparwyr addysg gynnar ffurfiol a gofal plant, yn cynnwys y rhai rydych yn talu amdanynt a'r rhai yr ydych yn derbyn oriau am ddim ganddynt.

Ddim yn siŵr pa fath o ddarparwr ydych chi'n ei defnyddio? Dim problem, gallwch chwilio amdano yma: Chwilio am ddarparwr gofal plant

ANALYSIS (set of dichotomous variables): "Provider used: nursery school" [and so on up to "Provider used: other"]

MULTICODE: GLOBAL SELECT ALL

1. Nursery school

(HELP SCREEN "For details please click here": Nursery school is a school in its own right, with most children aged 3 to 5. Sessions normally run for 2 ½ to 3 hours in the morning and/or afternoon.)

2. Nursery class – attached to a primary or infants' school

(HELP SCREEN "For details please click here": Nursery class attached to a primary or infants' school is often a separate unit within the school, with those in the nursery class aged 3 or 4. Sessions normally run for 2½ to 3 hours in the morning and/or afternoon.)

3. Out of School Childcare

(HELP SCREEN "For details please click here": Out of School Childcare would include care provided during school holidays or outside of school hours. It does not include wrap around care.)

4. Day nursery

(HELP SCREEN "For details please click here": Day nursery or full day care runs for the whole working day and may be closed for a few weeks in summer, if at all. This may be run by employers, private companies, community/voluntary group or the Local Authority, and can take children from birth upwards.)

•

5. Welsh-medium playgroup (Cylch meithrin)

(HELP SCREEN "For details please click here": Cylch Meithrin is a Welsh-medium Playgroup.)

6. Playgroup or pre-school

(HELP SCREEN "For details please click here": The term 'pre-school' is commonly used to describe many types of nursery education. For the purposes of this survey, pre-school is used to describe playgroups or sessional day care. This service is often run by a community/voluntary group, parents themselves, or privately. Fees are usually charged, with sessions of up to 4 hours.)

7. Childminder

(HELP SCREEN "For details please click here": Childminders look after a child or children in their own home for a fee.)

8. Other childcare provider [please specify] [Q. CAPTURED IN DATA AS **Prov_Oth** STRING]

1. Ysgol feithrin

(HELP SCREEN "Am fanylion cliciwch yma": Mae ysgol feithrin yn ysgol yn ei rhinwedd ei hun, gyda'r rhan fwyaf o'r plant yn 3 i 5 oed. Mae sesiynau fel arfer yn cael eu cynnal am 2 ½ i 3 awr yn y bore ac/neu'r prynhawn.)

2. Dosbarth meithrin – wedi ei atodi i ysgol gynradd neu fabanod

(HELP SCREEN "Am fanylion cliciwch yma": Mae dosbarth meithrin wedi ei atodi i ysgol gynradd neu fabanod fel arfer yn uned ar wahân yn yr ysgol, gyda'r rhai yn y dosbarth meithrin yn 3 neu 4 oed. Mae sesiynau fel arfer yn cael eu cynnal am 2 ½ i 3 awr yn y bore ac/neu'r prynhawn.)

3. Gofal plant y tu allan i oriau ysgol

(HELP SCREEN "Am fanylion cliciwch yma": Mae gofal plant y tu allan i oriau ysgol yn cynnwys gofal yn ystod gwyliau ysgol neu y tu allan i ddiwrnod ysgol. Nid yw'n cynnwys gofal cofleidiol)

4. Meithrinfa ddydd

(HELP SCREEN "Am fanylion cliciwch yma": Cynhelir meithrinfa ddydd neu ofal dydd llawn yn ystod y diwrnod gwaith cyfan ac efallai y bydd yn cau am ychydig wythnosau yn yr haf, os o gwbl. Efallai y bydd yn cael ei redeg gan gyflogwyr, cwmnïau preifat, grŵp cymunedol/gwirfoddol neu'r Awdurdod Lleol, a gall gymryd plant o ddim oed i fyny.)

•

5. Cylch meithrin (cyfrwng Cymraeg)

(HELP SCREEN "Am fanylion cliciwch yma": Mae Cylch Meithrin yn ysgol feithrin cyfrwng Cymraeg.)

6. Cylch chwarae neu gyn-ysgol arall

(HELP SCREEN "Am fanylion cliciwch yma": Defnyddir y term 'cyn ysgol' yn gyffredinol i ddisgrifio nifer o wahanol fathau o addysg feithrin. I ddibenion yr arolwg hwn, bwriedir i 'cyn ysgol' ddisgrifio grŵp chwarae neu ofal dydd sesiynol. Yn aml bydd y gwasanaeth yn cael ei gynnal gan grŵp cymunedol/gwirfoddol, rhieni eu hunain, neu'n breifat. Fel arfer fe godir ffioedd, gyda sesiynau o hyd at 4 awr.)

7. Gofalwr plant

(HELP SCREEN "Am fanylion cliciwch yma": Mae gofalwyr plant yn gofalu am blentyn neu blant yn eu cartrefi eu hunain am ffi.

8. Darparwr gofal plant arall [nodwch] [Q. CAPTURED IN DATA AS **Prov_Oth** STRING]

STRING {40}

(Calculate **ProvNum**=the number of codes selected at Prov. Valid range: 0-7)

(ANALYSIS (ProvNum): "Number of providers used in typical term-time week")

SOFT: IF Prov=DK Earlier you mentioned that you are currently using the free hours for your 3 to 4 year old. Please double check that you cannot specify which providers you are using for this child. Select next to continue.

DISPLAY QUESTION: {IF Prov= 1-8. ALSO IF D/K selected and then amended to include codes 1-8} You have told us that your child attends [text fill: number of codes selected at Prov between codes 1-8] formal provider/s: [textfill: all shortened answer code text given at Prov between codes 1-8].

If this is correct, please select next. Otherwise please amend your answer.

SOFT: IF Prov=DK Yn gynharach fe grybwylloch eich bod yn defnyddio oriau am ddim ar gyfer eich plentyn 3 i 4 oed ar hyn o bryd. Gwiriwch eto na allwch ddynodi pa ddarparwyr yr ydych yn eu defnyddio ar gyfer y plentyn hwn. Dewiswch nesaf i symud ymlaen.

DISPLAY QUESTION: {IF Prov= 1-8. ALSO IF D/K selected and then amended to include codes 1-8} Rydych wedi dweud wrthym fod eich plentyn yn mynychu [text fill: number of codes selected at Prov between codes 1-8] o ddarparwr/wyr ffurfiol: [textfill: all shortened answer code text given at Prov between codes 1-8].

Os yw hyn yn gywir, dewiswch nesaf. Fel arall, addaswch eich ateb.

(Questions from **ProvHrs** to **HolsFree** are asked about each provider type selected at **Prov 1-7**, and the provider type is textfilled from Prov)

ProvHrs {ASK IF **Prov** = 1-7. Ask on loop for all answers given at **Prov**}

In a typical week during this school term, so from this April 2018, how many hours in total does your child normally spend at this {#Prov}?

For example, if you take morning or afternoon sessions of 3 hours each day of the week, that would be 15 hours a week.

Please enter in the format hours:minutes. For example 1 hours and 30 minutes should be entered as 1:30

Mewn wythnos arferol yn ystod tymor yr ysgol, felly o fis Ebrill 2018, beth yw cyfanswm yr oriau mae eich plentyn fel arfer yn eu treulio yn y {#Prov} yma?

Er enghraifft, os ydych chi'n cymryd sesiynau bore neu brynhawn o 3 awr ar bob diwrnod o'r wythnos, byddai hynny yn 15 awr yr wythnos.

Rhowch ar y fformat oriau:munudau. Er enghraifft, byddai 1 awr 30 munud yn cael ei nodi fel 1:30

ANALYSIS: "Weekly hours spent at provider"

OPEN: [format for input must be HH:MM]

SOFT: {IF input does not follow HH:MM format}

HARD: number of hours and minutes should not exceed 50:00 and must be greater than 00:00

Please enter in the format hours:minutes.

For example 1 hours and 30 minutes should be entered as 1:30

OPEN: *[format for input must be HH:MM]*

SOFT: {IF input does not follow HH:MM format}

HARD: *ni ddylai'r nifer o oriau a munudau fod yn fwy na 50:00 a rhaid eu bod dros 00:00*

Rhowch ar y fformat oriau:munudau.

Er enghraifft, byddai 1 awr 30 munud yn cael ei nodi fel 1:30

ProvFees {ASK IF **Prov** = 1-7. Ask on loop for all answers given at **Prov**}

Do you pay fees for any of the hours that your child spends at this {**#Prov**}?

ProvFees {ASK IF **Prov** = 1-7. *Holwch ar gylch ar gyfer pob ateb a roddwyd yn **Prov***}

*A ydych chi'n talu unrhyw ffioedd ar gyfer yr oriau mae eich plentyn yn treulio yn y {**#Prov**} yma?*

ANALYSIS: "Fees paid for childcare hours"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes, I pay for all hours
- 2- Yes, I pay for the majority of hours
- 3- Yes, I pay for the minority of hours
- 4- No, I don't pay for any hours
- 5- Don't know

- 1- *Ydw, dwi'n talu am yr holl oriau*
- 2- *Ydw, dwi'n talu am fwyafrif yr oriau*
- 3- *Ydw, dwi'n talu am leiafrif yr oriau*
- 4- *Na, dwi ddim yn talu am unrhyw oriau*
- 5- *Ddim yn gwybod*

ProvCharge {ASK IF **Prov** = 1-7. Ask on a loop for all answers given at **Prov**}

And do you pay any separate or additional charges to this {**#Prov**}? This could include regular charges for lunches, snacks or special activities, but please do not include any fees for the hours you use.

ProvCharge {ASK IF **Prov** = 1-7. Holwch ar gyfwrth pob ateb a roddwyd yn **Prov**}

*Ac a ydych chi'n talu unrhyw daliadau ar wahân neu atodol i'r {**#Prov**} yma? Gallai hyn gynnwys taliadau rheolaidd am ginio, byrbrydau neu weithgareddau arbennig, ond peidiwch â chynnwys unrhyw ffioedd ar gyfer yr oriau a ddefnyddiwyd.*

ANALYSIS: "Whether paying additional charges to provider"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes, I pay additional charges
- 2-No, I do not pay any additional charges
- 3-Don't know

1- Ydw, dwi'n talu am bethau atodol

2-Na, dwi ddim yn talu am bethau atodol

3-Ddim yn gwybod

ProvTime {ASK IF **Prov** = 1-7. Ask on a loop for all answers given at **Prov**}

During a typical term-time week, at which times does your child go to this {**#Prov**}?

Please select all of the answers that cover the times your child goes to this {**#Prov**}. For example, if the session runs from 11am – 2pm please select answers 2 & 3.

*Yn ystod wythnos arferol yn ystod tymor, ar ba adegau mae angen i'ch plentyn fynd i'r {**#Prov**} yma?*

*Dewiswch yr holl atebion sy'n cwmpasu'r adegau pan fydd eich plentyn yn mynd i'r {**#Prov**} yma. Er enghraifft, os cynhelir y sesiwn rhwng 11am – 2pm dewiswch atebion 2 a 3.*

ANALYSIS: "Times child attends provider"

MULTICODE: GLOBAL SELECT ALL

- 1- Before 9am
 - 2- 9am up to 1pm
 - 3- 1pm up to 3pm
 - 4- 3pm up to 6pm
 - 5- After 6pm
- 1- Cyn 9am*
2- 9am tan 1pm
3- 1pm tan 3pm
4- 3pm tan 6pm
5- Wedi 6pm

ProvDay {ASK IF **Prov** = 1-7. Ask on a loop for all answers given at **Prov**}

During a typical term-time week, on which days of the week does your child go to this {**#Prov**}?

Yn ystod wythnos arferol yn ystod y tymor, ar ba ddyddiau o'r wythnos mae eich plentyn yn mynd i'r {#Prov} yma?

ANALYSIS: "Days child attends provider"

MULTICODE: GLOBAL SELECT ALL

- 1- Monday
- 2- Tuesday
- 3- Wednesday
- 4- Thursday
- 5- Friday
- 6- Weekend

- 1- Dydd Llun
- 2- Dydd Mawrth
- 3- Dydd Mercher
- 4- Dydd Iau
- 5- Dydd Gwener
- 6- Penwythnos

ProvFlex {ASK IF **Prov** = 1-7. Ask on a loop for all answers given at **Prov**}

Thinking back to when you signed up with {#Prov} to access the free hours of early education and childcare as part of the Childcare Offer for Wales...

Were you able to choose the days and times that your child attends during a typical term-time week?

Gan feddwl yn ôl i pan wnaethoch chi gofrestru gyda'r {#Prov} i gael mynediad at yr oriau am ddim o addysg gynnar a gofal plant yn rhan o'r Cynnig Gofal Plant Cymru...

A oeddech chi'n gallu dewis y dyddiau ac amserau mae eich plentyn yn mynychu yn ystod wythnos arferol yn ystod y tymor?

ANALYSIS: "Ability to choose times child attends provider"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes, I could freely choose when my child attends
- 2- Yes, I could choose when my child attends but within some restrictions specified by this provider
- 3- No, I had to take the days and times specified by this provider

1- Oeddwn, roeddwn i'n gallu dewis yn rhydd pryd mae fy mhentyn yn mynychu

2- Oeddwn, roeddwn i'n gallu dewis pryd mae fy mhentyn yn mynychu, ond o fewn rhai cyfyngiadau a ddynodwyd gan y darparwr hwn

3- Na, roedd rhaid i mi gymryd y dyddiau ac amserau a benodwyd gan y darparwr yma

FreeHrs {ASK IF **Prov** = 1-7. Ask on a loop for all answers given at **Prov**}
Do you receive any free hours at this {**#Prov**}?

Please include **any** free hours of early education and childcare you may receive as part of the new Childcare Offer for Wales. The free hours could also be in the form of a reduction on the bill from your provider

*A ydych chi'n derbyn unrhyw oriau am ddim yn yr {**#Prov**} yma?*

*Cynhwyswch **unrhyw** oriau am ddim o addysg gynnar a gofal plant yr ydych yn eu derbyn yn rhan o'r Cynnig Gofal Plant Cymru newydd. Dylai'r oriau am ddim hefyd fod ar ffurf gostyngiad ar y bil gan eich darparwr*

ANALYSIS: "Whether free hours received at provider"
SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes, I receive free hours/reduction on the bill at this provider
- 2- No, I do not receive free hours/reduction on the bill at this provider
- 3- Don't know
- 1- Ydw, dwi'n derbyn oriau am ddim/gostyngiad ar y bil gan y darparwr hwn*
- 2- Nac ydw, nid wyf yn derbyn oriau am ddim/gostyngiad ar y bil gan y darparwr hwn*
- 3- Ddim yn gwybod*

Hols {ASK within the provider loop (Prov1-7) AND IF **FreeHrs**=yes}
And have you used, or are planning to use, this {**#Prov**} for your child during school holidays?
*Ac a ydych chi wedi defnyddio, neu'n bwriadu defnyddio, yr {**#Prov**} yma ar gyfer eich plentyn yn ystod gwyliau ysgol?*

ANALYSIS: "Whether using/planning to use provider during holidays"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- I have used this provider during school holidays
- 2- I have {**not**} used this provider during school holidays but am {**planning**} to
- 3- I have {**not**} used this provider during school holidays and am {**not planning**} to
- 4- I have {**not**} used this provider during school holidays, it is {**not available**} from this provider
- 1- Dwi wedi defnyddio'r darparwr yma yn ystod gwyliau ysgol*
- 2- Dwi {**heb**} ddefnyddio'r darparwr yma yn ystod gwyliau ysgol ond dwi'n {**bwriadu**} gwneud*
- 3- Dwi {**heb**} ddefnyddio'r darparwr yma yn ystod gwyliau ysgol a dwi {**ddim yn bwriadu**} gwneud*
- 4- Dwi {**heb**} ddefnyddio'r darparwr yma yn ystod gwyliau ysgol, {**nid yw ar gael**} gan y darparwr hwn*

HolsFree {ASK within the provider loop (Prov1-7) AND IF **Hols** = 1 or 2}

And thinking specifically about the free hours you receive from this provider, have you used, or are planning to use, any free hours at this {#Prov} during school holidays?

A gan feddwl yn benodol am yr oriau am ddim a dderbyniwch gan y darparwr hwn, ydych chi wedi defnyddio, neu a ydych chi'n bwriadu defnyddio, unrhyw oriau am ddim gyda'r {#Prov} yma yn ystod gwyliau ysgol?

ANALYSIS: "Using/planning to use free hours at provider during holidays"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- I have used the free hours at this provider during school holidays
- 2- I have {not} used this provider during school holidays but am {planning} to
- 3- I have {not} used this provider during school holidays and am {not planning} to
- 4- I have {not} used this provider during school holidays, it is {not available} from this provider
- 5- Don't know

- 1- *Dwi wedi defnyddio'r oriau am ddim gyda'r darparwr yma yn ystod gwyliau ysgol*
- 2- *Dwi {heb} ddefnyddio'r darparwr yma yn ystod gwyliau ysgol ond dwi'n {bwriadu} gwneud*
- 3- *Dwi {heb} ddefnyddio'r darparwr yma yn ystod gwyliau ysgol a dwi {ddim yn bwriadu} gwneud*
- 4- *Dwi {heb} ddefnyddio'r darparwr yma yn ystod gwyliau ysgol, {nid yw ar gael} gan y darparwr hwn*
- 5- *Ddim yn gwybod*

Informal {ASK IF Chk=yes}

In addition to the formal provision you have just told us about, do any of your relatives (including grandparents) or friends look after your child in a typical term-time week on a regular basis?

Yn ogystal â'r ddarpariaeth ffurfiol yr ydych chi wedi rhoi gwybod i ni amdani, a oes unrhyw un o'ch perthnasau (yn cynnwys nain neu daid /mam-gu neu dad-cu) neu ffrindiau yn gofalu am eich plentyn yn ystod wythnos arferol yn ystod y tymor yn rheolaidd?

ANALYSIS: "Whether using informal childcare"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes
 - 2- No
-
- 1- Oes
 - 2- Nac oes

Section 4. Changes in childcare use since taking up The Childcare Offer for Wales

Adran 4. Newidiadau i ofal plant ers dechrau defnyddio Cynnig Gofal Plant Cymru

HowHeard {ASK IF Chk=yes}

Now we would like to ask you a few questions about how you began receiving the 30 free hours of early education and childcare, under the new Childcare Offer for Wales, and about any changes in early education and childcare for your child.

Nawr fe hoffem ofyn ychydig gwestiynau i chi ynghylch sut wnaethoch chi ddechrau derbyn y 30 awr am ddim o addysg gynnar a gofal plant dan y Cynnig Gofal Plant Cymru newydd, ac am unrhyw newidiadau mewn addysg gynnar a gofal plant ar gyfer eich plentyn.

How did you hear that your child may be eligible to the free hours of early education and childcare?

Sut wnaethoch chi glywed y gallai eich plentyn fod yn gymwys i gael yr oriau am ddim o addysg gynnar a gofal plant?

ANALYSIS: "How parent heard about policy"

MULTICODE: GLOBAL SELECT ALL

- 1- Current childcare provider
 - 2- School
 - 3- Local Authority letter/information leaflet
 - 4- Family centres (e.g. Flying Start centre)
 - 5- Employer
 - 6- Newspaper
 - 7- Internet/social media
 - 8- Word of mouth
 - 9- Talkchildcare media campaign
 - 10- Other (please specify: *STRING{80}*)
- 1- Darparwr gofal plant presennol*
- 2- Ysgol*
- 3- Llythyr/taflen wybodaeth gan yr Awdurdod Lleol*
- 4- Canolfannau teulu (e.e. Canolfan Dechrau'n Deg)*
- 5- Cyflogwr*
- 6- Papur newydd*
- 7- Rhyngrwyd/cyfryngau cymdeithasol*
- 8- Ar lafar*
- 9- Ymgyrch cyfryngau TrafodGofalPlant*
- 10- Arall (nodwch os gwelwch yn dda: *STRING{80}*)*

AppPro {ASK IF Chk=yes}

How easy was it to apply for the free hours under the new 30 hours free Childcare Offer for Wales?

Pa mor hawdd oedd hi i ymgeisio am yr oriau am ddim dan y Cynnig Gofal Plant Cymru 30 awr am ddim newydd?

ANALYSIS: "How easy it was to apply for the offer"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Very easy
- 2- Fairly easy
- 3- Fairly difficult
- 4- Very difficult

- 1- Hawdd iawn*
- 2- Gweddol hawdd*
- 3- Gweddol anodd*
- 4- Anodd iawn*

AppProWhy {ASK IF: AppPro= 3 OR 4}

Why was the application process difficult for you?

Pam oedd y broses ymgeisio yn anodd i chi?

ANALYSIS: "Reasons why the application process was difficult"

MULTICODE: GLOBAL SELECT ALL

- 1- Application form was difficult to find
- 2- Technical difficulties with the online application process
- 3- Time consuming completing the application
- 4- Accompanying documentation was difficult to provide (e.g. payslips)
- 5- Eligibility criteria for the offer were unclear
- 6- I did not understand the application form
- 7- Other (please specify: STRING{80})

- 1- Roedd yn anodd dod o hyd i'r ffurflen gais*
- 2- Anawsterau technegol gyda'r broses ymgeisio ar-lein*
- 3- Cymryd dipyn o amser i lenwi'r cais*
- 4- Roedd yn anodd darparu dogfennaeth ategol (e.e. Slipiau cyflog)*
- 5- Nid oedd y meini prawf ar gyfer y cynnig yn glir*
- 6- Doeddwn i ddim yn deall y ffurflen gais*
- 7- Arall (nodwch os gwelwch yn dda: STRING{80})*

ProvPre {ASK IF Chk=yes}

Did your child attend any formal early education and childcare providers before you began receiving the free hours under the Childcare Offer for Wales?

Please include childcare and early education at nurseries, pre-schools, nursery classes, childminders, schools and other formal settings but do not include any childcare from family members or friends.

A wnaeth eich plentyn fynychu unrhyw ddarparwyr addysg gynnar a gofal plant ffurfiol cyn i chi gychwyn derbyn yr oriau am ddim dan y Cynnig Gofal Plant Cymru?

Cynhwyswch unrhyw ofal plant ac addysg gynnar mewn meithrinfeydd, cyn ysgol, dosbarthiadau meithrin, gofaluwr plant, ysgolion neu leoliadau ffurfiol eraill ond peidiwch â chynnwys unrhyw ofal plant gan aelodau'r teulu neu ffrindiau.

ANALYSIS: "Whether attended formal early education or childcare prior to receiving free hours"

SINGLE CODE. GLOBAL SELECT ONE.

1-Yes

2-No

1-Do

2-Naddo

ProvHrsChng {ASK IF ProvPre=yes}

Since you started receiving the 30 free hours of early education and childcare under the Childcare Offer for Wales, in a typical term-time week does your child spend...

Ers i chi ddechrau derbyn y 30 awr o addysg gynnar a gofal plant am ddim dan y Cynnig Gofal Plant Cymru, mewn wythnos arferol yn ystod y tymor, a yw eich plentyn yn treulio...

ANALYSIS: "Change in number of formal childcare hours used since the new free hours"

SINGLE CODE. GLOBAL SELECT ONE.

1- More hours in formal early education and childcare than before?

2- The same number of hours in formal early education and childcare as before?

3- Fewer hours in formal early education and childcare than before?

•

1- Mwy o oriau mewn addysg gynnar ffurfiol a gofal plant nag o'r blaen?

2- Yr un faint o oriau mewn addysg gynnar ffurfiol a gofal plant ag o'r blaen?

3- Llai o oriau mewn addysg gynnar ffurfiol a gofal plant nag o'r blaen?

InformalHrsChng {ASK IF ProvPre=yes}

Since you started receiving the 30 free hours of early education and childcare under the Childcare Offer for Wales, in a typical term-time week, does your child spend...

(HELP SCREEN: ““For details please click here” Informal includes being looked after by relatives (including grandparents) or friends.)

Ers i chi ddechrau derbyn y 30 awr o addysg gynnar a gofal plant am ddim dan y Cynnig Gofal Plant Cymru, mewn wythnos arferol yn ystod y tymor, a yw eich plentyn yn treulio...

(HELP SCREEN: ““Am fanylion cliciwch yma” Mae anffurfiol yn cynnwys derbyn gofal gan berthnasau (yn cynnwys nain neu daid/mam-gu neu dad-cu) neu ffrindiau.)

ANALYSIS: “Change in number of informal childcare hours used since the new free hours”

SINGLE CODE. GLOBAL SELECT ONE.

- 1- More hours in informal early education and childcare than before?
 - 2- The same number of hours in informal early education and childcare as before?
 - 3- Fewer hours in informal early education and childcare than before?
- - 1- Mwy o oriau mewn addysg gynnar a gofal plant anffurfiol nag o'r blaen?
 - 2- Yr un faint o oriau mewn addysg gynnar a gofal plant anffurfiol ag o'r blaen?
 - 3- Llai o oriau mewn addysg gynnar a gofal plant anffurfiol nag o'r blaen?

ProvChange {ASK IF ProvPre= “yes”}

In order to take up the free hours of early education and childcare, have you needed to change which providers you use for your child?

Er mwyn manteisio ar yr oriau am ddim o addysg gynnar a gofal plant, a ydych chi wedi gorfod newid pa ddarparwr a ddefnyddiwyd ar gyfer eich plentyn?

ANALYSIS: “Whether needed to change providers to use the new free hours”

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes, I have had to change my early education and childcare provider(s)
- 2- No, I use the same early education and childcare provider(s) as before

- 1- Do, dwi wedi gorfod newid fy narparwr(wyr) addysg gynnar a gofal plant
- 2- Na, dwi'n defnyddio'r un darparwr(wyr) addysg gynnar a gofal plant ag o'r blaen

-
-

- **ProvMore** {ASK IF ProvChange = “yes”, “Don’t know” or “Prefer not to answer”}
 - In order to take up the free hours of early education and childcare, have you needed to use **additional** providers?
 -
 - *Er mwyn manteisio ar yr oriau am ddim o addysg gynnar a gofal plant, a ydych chi wedi gorfod defnyddio darparwyr **ychwanegol**?*
 -
 -
 - ANALYSIS: “Whether needed to start using more early education and childcare providers to take up of new free hours”
- SINGLE CODE. GLOBAL SELECT ONE.
- - 1- Yes, I have needed to use additional provider(s)
 - 2- No, I use the same number of providers as before

-
- 1- Do, dwi wedi angen defnyddio
- 2- Na, dwi'n defnyddio'r un faint o ddarparwyr ag o'r blaen

PreWelshProv {ASK IF ProvPre= “yes”}

Thinking back to **before** you began receiving the free hours of early education and childcare under the Childcare Offer for Wales, did you access Welsh-medium/bilingual early education and childcare?

*Gan feddwl yn ôl i **cyn** i chi ddechrau derbyn addysg gynnar a gofal plant am ddim dan y Cynnig Gofal Plant Cymru, a wnaethoch chi gael mynediad at addysg gynnar a gofal plant cyfrwng Cymraeg/dwyieithog?*

ANALYSIS: “Use of Welsh-medium/bilingual childcare before the offer”

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes
- 2- No, not able to
- 3- No, did not want to
- 4- Don't know

- 1- Do
- 2- Naddo, ddim yn gallu
- 3- Naddo, ddim eisiau
- 4- Ddim yn gwybod

PostWelshProv {ASK IF Chk=yes"}

Since taking up the free hours of early education and childcare under the Childcare Offer for Wales, have you been able to access Welsh speaking/bilingual provision for the free hours that you are using?

Ers manteisio ar yr addysg gynnar a gofal plant dan y Cynnig Gofal Plant Cymru, a ydych chi wedi gallu cael mynediad at ddarpariaeth cyfrwng Cymraeg/dwyieithog ar gyfer yr oriau am ddim yr ydych yn eu defnyddio?

ANALYSIS: "Access to Welsh-medium/bilingual childcare since the offer"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- I **want** to access it and have been **able** to
- 3- I **want** to access it, but **not available**
- 4- I **do not want** to access it
- 5- Don't know

- 1- Dwi **eisiau** cael mynediad at hyn ac wedi **gallu** gwneud
- 3- Dwi **eisiau** cael mynediad at hyn, ond **nid yw ar gael**
- 4- Dwi **ddim eisiau** mynediad at hyn
- 5- Ddim yn gwybod

SENProv {ASK IF SEN = 1 "yes"}

You mentioned that your child has some special educational needs (SEN). Since taking up the new free hours has your early education and childcare provider(s) been able to give the support that your child needs?

Rydych wedi crybwyll fod gan eich plentyn rai anghenion addysgol arbennig (AAA). Ers i chi fanteisio ar yr oriau am ddim newydd, a yw eich darparwr(wyr) addysg gynnar a gofal plant wedi gallu rhoi'r gefnogaeth mae eich plentyn angen?

ANALYSIS: "Access to SEN support since the offer"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes
- 2- No

- 1- *Do*
- 2- *Naddo*

Section 5. Employment

Adran 5. Cyflogaeth

Gender {ASK IF Chk=yes}

The next few questions are about you, your family, and any paid work you may do.

Mae'r cwestiynau nesaf amdanoch chi, eich teulu, ac unrhyw waith cyflogedig yr ydych yn ei wneud.

What is your gender?

Beth yw eich rhyw?

ANALYSIS: "Respondent's gender"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Female
- 2- Male
- 3- Transgender female
- 4- Transgender male
- 5- Gender variant/non-binary
- 6- Other (please specify: STRING{80})
- 7- Prefer not to say

1- Benywaidd

2- Gwrywaidd

3- Benyw drawsrywiol

4- Gwryw trawsrywiol

5- Rhyw amrywiol/anneuaidd

6- Arall (nodwch os gwelwch yn dda: STRING{80})

7- Mae'n well gennyf beidio dweud

Partner {ASK IF Chk=yes}

Do you currently have a partner or a spouse living with you?

A oes gennych chi bartner neu gyfar yn byw gyda chi ar hyn o bryd?

ANALYSIS: "Partner or spouse living with respondent"

SINGLE CODE. GLOBAL SELECT ONE.

1- Yes

2- No

1- Do

2- Naddo

REmp {ASK IF Chk=yes}

Now thinking about work, are you currently in paid employment, either as an employee, a business owner, or as self-employed?

Nawr gan feddwl am waith, a ydych chi ar hyn o bryd mewn swydd gyflogedig, naill ai fel cyflogai, perchennog busnes neu'n hunangyflogedig?

ANALYSIS: "Respondent: Whether in paid employment".

SINGLE CODE. GLOBAL SELECT ONE.

1- Yes

2- No

1- Do

2- Naddo

SOFT: IF REmp=No You reported that you are not currently in paid employment. Is this correct? If Yes, select Next, otherwise please amend your answer.

SOFT: IF REmp=No Fe adroddoch nad ydych chi mewn gwaith cyflogedig ar hyn o bryd. Ydy hyn yn gywir? Os Ydi, dewiswch Nesaf, fel arall newidiwch eich ateb.

RHours {ASK IF REmp=yes}

How many hours per week do you usually work, excluding meal breaks but including any paid or unpaid overtime?

Faint o oriau'r wythnos ydych chi fel arfer yn gweithio, ac eithrio egwylliau ar gyfer prydau ond yn cynnwys unrhyw oramser cyflogedig neu ddi-dâl?

ANALYSIS: "Respondent: Work hours per week".

SINGLE CODE. GLOBAL SELECT ONE.

1- 1-10 hours

2- 11-15 hours

3- 16-20 hours

4- 21-30 hours

- 5- 31-40 hours
- 6- More than 40 hours per week

- 1- 1-10 awr
- 2- 11-15 awr
- 3- 16-20 awr
- 4- 21-30 awr
- 5- 31-40 awr
- 6- Mwy na 40 awr yr wythnos

RHrsWrkCh {ASK IF REmp=yes }

Compared to the time **before** you started receiving the free hours of early education and childcare under the Childcare Offer for Wales, do you work the same number of hours now as you worked then?

O gymharu â'r amser cyn i chi ddechrau derbyn yr oriau am ddim o addysg gynnar a gofal plant dan y Cynnig Gofal Plant Cymru, a ydych chi'n gweithio'r un faint o oriau nawr ag yr oeddech chi adeg hynny?

ANALYSIS: "Respondent: Change in number of hours worked"

READ OUT. SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes, I work the same number of hours now as before
- 2- No, I work more hours now
- 3- No, I work fewer hours now
- 4- I was not working prior to receiving the free hours
- 1- Ydw, dwi'n gweithio'r un faint o oriau nawr ag o'r blaen
- 2- Nac ydw, dwi'n gweithio mwy o oriau nawr
- 3- Nac ydw, dwi'n gweithio llai o oriau nawr
- 4- Doeddw'n i ddim yn gweithio cyn derbyn yr oriau am ddim

PartnerEmp {ASK IF Partner=yes}

Is your partner currently in paid employment, either as an employee, a business owner, or as self-employed?

A yw eich partner ar hyn o bryd mewn swydd gyflogedig, naill ai fel cyflogai, perchennog busnes neu'n hunangyflogedig?

ANALYSIS: "Partner: Whether in paid employment".

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes
- 2- No
- 1- Do
- 2- Naddo

SOFT: IF PartnerEmp=No “You reported that your partner is not currently in paid employment. Is this correct? If Yes, select Next, otherwise please amend your answer.”

SOFT: IF PartnerEmp=No “Fe adroddoch nad yw eich partner mewn gwaith cyflogedig ar hyn o bryd. Ydy hyn yn gywir? Os Ydi, dewiswch Nesaf, fel arall newidiwch eich ateb.”

PHours {ASK IF PartnerEmp=yes}

How many hours per week does your partner usually work, excluding meal breaks but including any paid or unpaid overtime?

Faint o oriau'r wythnos mae eich partner fel arfer yn gweithio, ac eithrio egwylliau ar gyfer prydau ond yn cynnwys unrhyw oramser cyflogedig neu ddi-dâl?

ANALYSIS: “Partner: Work hours per week”.

SINGLE CODE. GLOBAL SELECT ONE.

- 1- 1-10 hours
- 2- 11-15 hours
- 3- 16-20 hours
- 4- 21-30 hours
- 5- 31-40 hours
- 6- More than 40 hours per week

- 1- 1-10 awr
- 2- 11-15 awr
- 3- 16-20 awr
- 4- 21-30 awr
- 5- 31-40 awr
- 6- Mwy na 40 awr yr wythnos

PHrsWrkCh {ASK IF PartnerEmp=yes}

Compared to the time **before** you started receiving the free hours of early education and childcare under the Childcare Offer for Wales, does your partner work the same number of hours now as he/she worked then?

*O gymharu â'r amser **cyn** i chi ddechrau derbyn yr oriau am ddim o addysg gynnar a gofal plant dan y Cynnig Gofal Plant Cymru, a yw eich partner yn gweithio'r un faint o oriau nawr ag yr oedd adeg hynny?*

ANALYSIS: “Partner: Change in number of hours worked”

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes, he/she works the same number of hours now as before
 - 2- No, he/she works more hours now
 - 3- No, he/she works fewer hours now
 - 4- He/she did not work prior to receiving the free hours
- 1- Ydi, mae'n gweithio'r un faint o oriau nawr ag o'r blaen*

- 2- Nac ydi, mae'n gweithio mwy o oriau nawr
- 3- Nac ydi, mae'n gweithio llai o oriau nawr
- 4- Nid oedd yn gweithio cyn derbyn yr oriau am ddim

Section 6. Other perceived impacts on the family

Adran 6. Effeithiau deongledig eraill ar y teulu

WorkFlex {ASK IF Chk=yes}

For the next few questions please think about the 30 free hours of early education and childcare under the Childcare Offer for Wales.

Ar gyfer y cwestiynau nesaf, meddyliwch am y 30 o oriau am ddim o addysg gynnar a gofal plant dan y Cynnig Gofal Plant Cymru.

Do you think these free hours have given you more flexibility in which jobs you can do and how many hours you can work?

Ydych chi'n meddwl fod yr oriau am ddim hyn wedi rhoi mwy o hyblygrwydd i chi o ran pa swyddi y gallwch eu gwneud a faint o oriau allwch chi weithio?

ANALYSIS: "Whether extended hours has improved flexibility in work decisions"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Yes, the free hours have given me more flexibility
- 2- No, the free hours have not changed how much flexibility I have
- 3- Don't know

1- Ydw, mae'r oriau am ddim wedi rhoi mwy o hyblygrwydd i mi

2- Na, dyw'r oriau am ddim heb newid llawer ar faint o hyblygrwydd sydd gen i

3- Ddim yn gwybod

[COMPUTE NC OUTCOME 210 (PARTIAL COMPLETE) HERE]

LearnOpp {ASK IF Chk=yes}

And do you think these free hours have improved your opportunities for in-work training and other learning and development (L&D)?

Ac a ydych chi'n meddwl fod yr oriau am ddim yma wedi gwella eich cyfleoedd ar gyfer hyfforddiant yn y gwaith a chyfleoedd dysgu a datblygu eraill?

ANALYSIS: "Whether perceive improved learning and development opportunities"

SINGLE CODE. GLOBAL SELECT ONE.

1- Yes, the free hours have given me more opportunities for training and other L&D

2- No, the free hours have not changed my opportunities for training and other L&D

3- Don't know

1- Do, mae'r oriau am ddim wedi rhoi mwy o gyfleoedd i mi ar gyfer hyfforddiant a dysgu a datblygu

2- Na, dyw'r oriau am ddim heb newid fy nghyfleoedd ar gyfer hyfforddiant a dysgu a datblygu

3- Ddim yn gwybod

EarnOpp {ASK IF Chk=yes}

And do you think these free hours have given you the potential to increase your earnings?

Ac a ydych chi'n meddwl fod yr oriau am ddim yma wedi rhoi potensial i chi gynyddu eich enillion?

ANALYSIS: "Whether perceive improved earning opportunities"

SINGLE CODE. GLOBAL SELECT ONE.

1- Yes, the free hours have given me more opportunities to increase my earnings.

2- No, the free hours have not changed my opportunities to increase my earnings

3- Don't know

1- Ydw, mae'r oriau am ddim wedi rhoi mwy o gyfleoedd i mi gynyddu fy enillion.

2- Na, dyw'r oriau am ddim heb newid fy nghyfleoedd i gynyddu fy enillion

3- Ddim yn gwybod

FinImpact {ASK IF Chk=yes}

What difference, if any, do you think the free hours of early education and childcare have made to your family finances?

Pa wahaniaeth, os gwbl, ydych chi'n meddwl y mae'r oriau am ddim o addysg gynnar a gofal plant wedi ei gael ar sefyllfa ariannol eich teulu?

ANALYSIS: "Impact of free hours on family finances"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- We have much more money to spend now than before
- 2- We have slightly more money to spend now than before
- 3- It has made no real difference to the money we have to spend
- 4- Don't know

- 1- *Mae gennym lawer mwy o arian i'w wario nawr nag o'r blaen*
- 2- *Mae gennym ychydig mwy o arian i'w wario nawr nag o'r blaen*
- 3- *Nid yw wedi gwneud gwahaniaeth gwirioneddol i'r arian sydd gennym i'w wario*
- 4- *Ddim yn gwybod*

Section 7. Family socio-demographics

Qual {ASK IF Chk=yes}

We have just a few final questions now. What is the **highest** education qualification that you currently have?

*Mae ambell gwestiwn arall i gloi nawr. Beth yw'r cymhwyster addysg **uchaf** sydd gennych chi ar hyn o bryd?*

ANALYSIS: "Respondent's highest education qualification"

SINGLE CODE. GLOBAL SELECT ONE.

- 1- Degree or higher degree or equivalent; NVQ or SVQ levels 4 or 5
- 2- Higher educational qualification below degree level
- 3- A levels or Highers; NVQ or SVQ level 3
- 4- GCSE grades A-C; CSE grade 1; NVQ or SVQ level 2
- 5- GCSE grades D-G; CSE grade 2-5; NVQ or SVQ level 1
- 6- Other qualifications (including vocational and foreign qualifications below degree level)
- 7- No formal qualifications

- 1- Gradd neu radd uwch neu gyfatebol; NVQ neu SVQ lefelau 4 neu 5
- 2- Cymhwyster addysg uwch uwchlaw lefel gradd
- 3- Lefel A neu Highers; NVQ neu SVQ lefel 3
- 4- TGAU graddau A-C; CSE gradd 1; NVQ neu SVQ lefel 2
- 5- TGAU graddau D-G; CSE gradd 2-5; NVQ neu SVQ lefel 1
- 6- Cymwysterau eraill (yn cynnwys cymwysterau galwedigaethol a thramor islaw lefel gradd)
- 7- Dim cymwysterau ffurfiol

[COMPUTE NC OUTCOME 110 (FULLY COMPLETE) HERE]

TIOB {ASK IF Chk=yes}

What is your **total household income per year**, that is, income from all sources including benefits, before tax and other deductions?

- 1- Up to £10,399
- 2- £10,400 to £15,599
- 3- £15,600 to £20,799
- 4- £20,800 to £25,999
- 5- £26,000 to £31,199
- 6- £31,200 to £41,599
- 7- £41,600 to £51,999
- 8- £52,000 to £99,999
- 9- £100,000 or more

*Beth yw **cyfanswm incwm eich cartref y flwyddyn**, hynny yw, yr incwm o bob ffynhonnell yn cynnwys budd-daliadau, cyn treth a didyniadau eraill?*

- 1- Hyd at £10,399
- 2- £10,400 i £15,599

3- £15,600 i £20,799
4- £20,800 i £25,999
5- £26,000 i £31,199
6- £31,200 i £41,599
7- £41,600 i £51,999
8- £52,000 i £99,999
9- £100,000 neu fwy

Thank [please display as end of interview text, not a new question]
You have reached the end of the survey.

Many thanks for your help with our research. We really appreciate your time and your contribution.

Best wishes,

NatCen Social Research

Rydych chi wedi cyrraedd diwedd yr arolwg.

Diolch yn fawr am eich help gyda'n hymchwil. Rydym wir yn gwerthfawrogi eich amser a'ch cyfraniad.

Dymuniadau gorau,

NatCen Social Research